

## PROFESSIONAL SERVICES CONTRACT

**Contract # EDS A27-26-009**

This Contract ("Contract"), entered into by and between the **Indiana Secretary of State (the "State")** and **Venturit Inc. (the "Contractor")**, is executed pursuant to the terms and conditions set forth herein. In consideration of those mutual undertakings and covenants, the parties agree as follows:

**1. Duties of Contractor.** The Contractor shall provide the following services relative to this Contract:

BSD Notary Modernization services as detailed in **Attachment A**, subject to performance terms and conditions detailed in **Attachment B**.

**2. Consideration.** The Contractor will be paid for goods and professional services on an as-needed basis, at rates detailed in **Attachment A** for performing the duties set forth above. Total remuneration under this Contract shall not exceed **Four Hundred Thirty-Two Thousand Dollars (\$432,000.00)**.

**3. Term.** This Contract shall be effective for a period of **11 months**. It shall commence on **August 1, 2025** and shall remain in effect through **June 30, 2026**.

**4. Access to Records.** The Contractor and its subcontractors, if any, shall maintain all books, documents, papers, accounting records, and other evidence pertaining to all costs incurred under this Contract. They shall make such materials available at their respective offices at all reasonable times during this Contract, and for three (3) years from the date of final payment under this Contract, for inspection by the State or its authorized designees. Copies shall be furnished at no cost to the State if requested.

**5. Assignment; Successors.**

A. The Contractor binds its successors and assignees to all the terms and conditions of this Contract. The Contractor may assign its right to receive payments to such third parties as the Contractor may desire without the prior written consent of the State, provided that the Contractor gives written notice (including evidence of such assignment) to the State thirty (30) days in advance of any payment so assigned. The assignment shall cover all unpaid amounts under this Contract and shall not be made to more than one party.

B. The Contractor shall not assign or subcontract the whole or any part of this Contract without the State's prior written consent. Additionally, the Contractor shall provide prompt written notice to the State of any change in the Contractor's legal name or legal status so that the changes may be documented and payments to the successor entity may be made.

**6. Assignment of Antitrust Claims.** As part of the consideration for the award of this Contract, the Contractor assigns to the State all right, title and interest in and to any claims the Contractor now has, or may acquire, under state or federal antitrust laws relating to the products or services which are the subject of this Contract.

**7. Audits.** The Contractor acknowledges that it may be required to submit to an audit of funds paid through this Contract. Any such audit shall be conducted in accordance with IC § 5-11-1, *et seq.*, and audit guidelines specified by the State.

The State considers the Contractor to be a “Contractor” under 2 C.F.R. 200.331 for purposes of this Contract. However, if it is determined that the Contractor is a “subrecipient” and if required by applicable provisions of 2 C.F.R. 200 (Uniform Administrative Requirements, Cost Principles, and Audit Requirements), Contractor shall arrange for a financial and compliance audit, which complies with 2 C.F.R. 200.500 *et seq.*

**8. Authority to Bind Contractor.** The signatory for the Contractor represents that he/she has been duly authorized to execute this Contract on behalf of the Contractor and has obtained all necessary or applicable approvals to make this Contract fully binding upon the Contractor when his/her signature is affixed, and accepted by the State.

**9. Changes in Work.** The Contractor shall not commence any additional work or change the scope of the work until authorized in writing by the State. The Contractor shall make no claim for additional compensation in the absence of a prior written approval and amendment executed by all signatories hereto. This Contract may only be amended, supplemented or modified by a written document executed in the same manner as this Contract.

**10. Compliance with Laws.**

A. The Contractor shall comply with all applicable federal, state, and local laws, rules, regulations, and ordinances, and all provisions required thereby to be included herein are hereby incorporated by reference. The enactment or modification of any applicable state or federal statute or the promulgation of rules or regulations thereunder after execution of this Contract shall be reviewed by the State and the Contractor to determine whether the provisions of this Contract require formal modification.

B. The Contractor and its agents shall abide by all ethical requirements that apply to persons who have a business relationship with the State as set forth in IC § 4-2-6, *et seq.*, IC § 4-2-7, *et seq.* and the regulations promulgated thereunder. **If the Contractor has knowledge, or would have acquired knowledge with reasonable inquiry, that a state officer, employee, or special state appointee, as those terms are defined in IC § 4-2-6-1, has a financial interest in the Contract, the Contractor shall ensure compliance with the disclosure requirements in IC § 4-2-6-10.5 prior to the execution of this Contract.** If the Contractor is not familiar with these ethical requirements, the Contractor should refer any questions to the Indiana State Ethics Commission or visit the Inspector General’s website at <http://www.in.gov/ig/>. If the Contractor or its agents violate any applicable ethical standards, the State may, in its sole discretion, terminate this Contract immediately upon notice to the Contractor. In addition, the Contractor may be subject to penalties under IC §§ 4-2-6, 4-2-7, 35-44.1-1-4, and under any other applicable laws.

C. The Contractor certifies by entering into this Contract that neither it nor its principal(s) is presently in arrears in payment of taxes, permit fees or other statutory, regulatory or judicially required payments to the State of Indiana. The Contractor agrees that any payments currently due to the State of Indiana may be withheld from payments due to the Contractor. Additionally, further work or payments may be withheld, delayed, or denied and/or this Contract suspended until the Contractor is current in its payments and has submitted proof of such payment to the State.

D. The Contractor warrants that it has no current, pending or outstanding criminal, civil, or enforcement actions initiated by the State, and agrees that it will immediately notify the State of any such actions. During the term of such actions, the Contractor agrees that the State may delay, withhold, or deny work under any supplement, amendment, change order or other contractual device issued pursuant to this Contract.

E. If a valid dispute exists as to the Contractor's liability or guilt in any action initiated by the State or its agencies, and the State decides to delay, withhold, or deny work to the Contractor, the Contractor may request that it be allowed to continue, or receive work, without delay. The Contractor must submit, in writing, a request for review to the Indiana Department of Administration (IDOA) following the procedures for disputes outlined herein. A determination by IDOA shall be binding on the parties. Any payments that the State may delay, withhold, deny, or apply under this section shall not be subject to penalty or interest, except as permitted by IC § 5-17-5.

F. The Contractor warrants that the Contractor and its subcontractors, if any, shall obtain and maintain all required permits, licenses, registrations, and approvals, and shall comply with all health, safety, and environmental statutes, rules, or regulations in the performance of work activities for the State. Failure to do so may be deemed a material breach of this Contract and grounds for immediate termination and denial of further work with the State.

G. The Contractor affirms that, if it is an entity described in IC Title 23, it is properly registered and owes no outstanding reports to the Indiana Secretary of State.

H. As required by IC § 5-22-3-7:

(1) The Contractor and any principals of the Contractor certify that:

(A) the Contractor, except for de minimis and nonsystematic violations, has not violated the terms of:

(i) IC §24-4.7 [Telephone Solicitation Of Consumers];

(ii) IC §24-5-12 [Telephone Solicitations]; or

(iii) IC §24-5-14 [Regulation of Automatic Dialing Machines];

in the previous three hundred sixty-five (365) days, even if IC § 24-4.7 is preempted by federal law; and

(B) the Contractor will not violate the terms of IC § 24-4.7 for the duration of the Contract, even if IC §24-4.7 is preempted by federal law.

(2) The Contractor and any principals of the Contractor certify that an affiliate or principal of the Contractor and any agent acting on behalf of the Contractor or on behalf of an affiliate or principal of the Contractor, except for de minimis and nonsystematic violations,

(A) has not violated the terms of IC § 24-4.7 in the previous three hundred sixty-five (365) days, even if IC §24-4.7 is preempted by federal law; and

(B) will not violate the terms of IC § 24-4.7 for the duration of the Contract, even if IC §24-4.7 is preempted by federal law.

**11. Condition of Payment.** All services provided by the Contractor under this Contract must be performed to the State's reasonable satisfaction, as determined at the discretion of the undersigned State representative and in accordance with all applicable federal, state, local laws, ordinances, rules and regulations. The State shall not be required to pay for work found to be unsatisfactory, inconsistent with this Contract or performed in violation of any federal, state or local statute, ordinance, rule or regulation.

**12. Confidentiality of State Information.** The Contractor understands and agrees that data, materials, and information disclosed to the Contractor may contain confidential and protected information. The Contractor covenants that data, material, and information gathered, based upon or disclosed to the

Contractor for the purpose of this Contract will not be disclosed to or discussed with third parties without the prior written consent of the State.

The parties acknowledge that the services to be performed by Contractor for the State under this Contract may require or allow access to data, materials, and information containing Social Security numbers maintained by the State in its computer system or other records. In addition to the covenant made above in this section and pursuant to 10 IAC 5-3-1(4), the Contractor and the State agree to comply with the provisions of IC § 4-1-10 and IC § 4-1-11. If any Social Security number(s) is/are disclosed by Contractor, Contractor agrees to pay the cost of the notice of disclosure of a breach of the security of the system in addition to any other claims and expenses for which it is liable under the terms of this contract.

### **13. Continuity of Services.**

A. The Contractor recognizes that the service(s) to be performed under this Contract are vital to the State and must be continued without interruption and that, upon Contract expiration, a successor, either the State or another contractor, may continue them. The Contractor agrees to:

1. Furnish phase-in training; and
2. Exercise its best efforts and cooperation to effect an orderly and efficient transition to a successor.

B. The Contractor shall, upon the State's written notice:

1. Furnish phase-in, phase-out services for up to sixty (60) days after this Contract expires; and
2. Negotiate in good faith a plan with a successor to determine the nature and extent of phase-in, phase-out services required. The plan shall specify a training program and a date for transferring responsibilities for each division of work described in the plan, and shall be subject to the State's approval. The Contractor shall provide sufficient experienced personnel during the phase-in, phase-out period to ensure that the services called for by this Contract are maintained at the required level of proficiency.

C. The Contractor shall allow as many personnel as practicable to remain on the job to help the successor maintain the continuity and consistency of the services required by this Contract. The Contractor also shall disclose necessary personnel records and allow the successor to conduct on-site interviews with these employees. If selected employees are agreeable to the change, the Contractor shall release them at a mutually agreeable date and negotiate transfer of their earned fringe benefits to the successor.

D. The Contractor shall be reimbursed for all reasonable phase-in, phase-out costs (i.e., costs incurred within the agreed period after contract expiration that result from phase-in, phase-out operations).

### **14. Debarment and Suspension.**

A. The Contractor certifies by entering into this Contract that neither it nor its principals nor any of its subcontractors are presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from entering into this Contract by any federal agency or by any department, agency or political subdivision of the State of Indiana. The term "principal" for purposes of this Contract means an officer, director, owner, partner, key employee or other person with primary management or supervisory responsibilities, or a person who has a critical influence on or substantive control over the operations of the Contractor.

B. The Contractor certifies that it has verified the state and federal suspension and debarment status for all subcontractors receiving funds under this Contract and shall be solely responsible for any recoupment, penalties or costs that might arise from use of a suspended or debarred subcontractor. The Contractor shall immediately notify the State if any subcontractor becomes debarred or suspended, and shall, at the



State's request, take all steps required by the State to terminate its contractual relationship with the subcontractor for work to be performed under this Contract.

**15. Default by State.** If the State, sixty (60) days after receipt of written notice, fails to correct or cure any material breach of this Contract, the Contractor may cancel and terminate this Contract and institute measures to collect monies due up to and including the date of termination.

**16. Disputes.**

A. Should any disputes arise with respect to this Contract, the Contractor and the State agree to act immediately to resolve such disputes. Time is of the essence in the resolution of disputes.

B. The Contractor agrees that, the existence of a dispute notwithstanding, it will continue without delay to carry out all of its responsibilities under this Contract that are not affected by the dispute. Should the Contractor fail to continue to perform its responsibilities regarding all non-disputed work, without delay, any additional costs incurred by the State or the Contractor as a result of such failure to proceed shall be borne by the Contractor, and the Contractor shall make no claim against the State for such costs.

C. If the parties are unable to resolve a contract dispute between them after good faith attempts to do so, a dissatisfied party shall submit the dispute to the Commissioner of the Indiana Department of Administration for resolution. The dissatisfied party shall give written notice to the Commissioner and the other party. The notice shall include: (1) a description of the disputed issues, (2) the efforts made to resolve the dispute, and (3) a proposed resolution. The Commissioner shall promptly issue a Notice setting out documents and materials to be submitted to the Commissioner in order to resolve the dispute; the Notice may also afford the parties the opportunity to make presentations and enter into further negotiations. Within thirty (30) business days of the conclusion of the final presentations, the Commissioner shall issue a written decision and furnish it to both parties. The Commissioner's decision shall be the final and conclusive administrative decision unless either party serves on the Commissioner and the other party, within ten (10) business days after receipt of the Commissioner's decision, a written request for reconsideration and modification of the written decision. If the Commissioner does not modify the written decision within thirty (30) business days, either party may take such other action helpful to resolving the dispute, including submitting the dispute to an Indiana court of competent jurisdiction. If the parties accept the Commissioner's decision, it may be memorialized as a written Amendment to this Contract if appropriate.

D. The State may withhold payments on disputed items pending resolution of the dispute. The unintentional nonpayment by the State to the Contractor of one or more invoices not in dispute in accordance with the terms of this Contract will not be cause for the Contractor to terminate this Contract, and the Contractor may bring suit to collect these amounts without following the disputes procedure contained herein.

E. With the written approval of the Commissioner of the Indiana Department of Administration, the parties may agree to forego the process described in subdivision C. relating to submission of the dispute to the Commissioner.

F. This paragraph shall not be construed to abrogate provisions of IC § 4-6-2-11 in situations where dispute resolution efforts lead to a compromise of claims in favor of the State as described in that statute. In particular, releases or settlement agreements involving releases of legal claims or potential legal claims of the state should be processed consistent with IC § 4-6-2-11, which requires approval of the Governor and Attorney General.

**17. Drug-Free Workplace Certification.** As required by Executive Order No. 90-5 dated April 12, 1990, issued by the Governor of Indiana, the Contractor hereby covenants and agrees to make a good faith effort to provide and maintain a drug-free workplace. The Contractor will give written notice to the State within ten (10) days after receiving actual notice that the Contractor, or an employee of the Contractor in the State of Indiana, has been convicted of a criminal drug violation occurring in the workplace. False certification or violation of this certification may result in sanctions including, but not limited to, suspension of contract payments, termination of this Contract and/or debarment of contracting opportunities with the State for up to three (3) years.

In addition to the provisions of the above paragraph, if the total amount set forth in this Contract is in excess of \$25,000.00, the Contractor certifies and agrees that it will provide a drug-free workplace by:

- A. Publishing and providing to all of its employees a statement notifying them that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the Contractor's workplace, and specifying the actions that will be taken against employees for violations of such prohibition;
- B. Establishing a drug-free awareness program to inform its employees of: (1) the dangers of drug abuse in the workplace; (2) the Contractor's policy of maintaining a drug-free workplace; (3) any available drug counseling, rehabilitation and employee assistance programs; and (4) the penalties that may be imposed upon an employee for drug abuse violations occurring in the workplace;
- C. Notifying all employees in the statement required by subparagraph (A) above that as a condition of continued employment, the employee will: (1) abide by the terms of the statement; and (2) notify the Contractor of any criminal drug statute conviction for a violation occurring in the workplace no later than five (5) days after such conviction;
- D. Notifying the State in writing within ten (10) days after receiving notice from an employee under subdivision (C)(2) above, or otherwise receiving actual notice of such conviction;
- E. Within thirty (30) days after receiving notice under subdivision (C)(2) above of a conviction, imposing the following sanctions or remedial measures on any employee who is convicted of drug abuse violations occurring in the workplace: (1) taking appropriate personnel action against the employee, up to and including termination; or (2) requiring such employee to satisfactorily participate in a drug abuse assistance or rehabilitation program approved for such purposes by a federal, state or local health, law enforcement, or other appropriate agency; and
- F. Making a good faith effort to maintain a drug-free workplace through the implementation of subparagraphs (A) through (E) above.

**18. Employment Eligibility Verification.** As required by IC § 22-5-1.7, the Contractor swears or affirms under the penalties of perjury that the Contractor does not knowingly employ an unauthorized alien. The Contractor further agrees that:

- A. The Contractor shall enroll in and verify the work eligibility status of all his/her/its newly hired employees through the E-Verify program as defined in IC § 22-5-1.7-3. The Contractor is not required to participate should the E-Verify program cease to exist. Additionally, the Contractor is not required to participate if the Contractor is self-employed and does not employ any employees.

B. The Contractor shall not knowingly employ or contract with an unauthorized alien. The Contractor shall not retain an employee or contract with a person that the Contractor subsequently learns is an unauthorized alien.

C. The Contractor shall require his/her/its subcontractors, who perform work under this Contract, to certify to the Contractor that the subcontractor does not knowingly employ or contract with an unauthorized alien and that the subcontractor has enrolled and is participating in the E-Verify program. The Contractor agrees to maintain this certification throughout the duration of the term of a contract with a subcontractor.

The State may terminate for default if the Contractor fails to cure a breach of this provision no later than thirty (30) days after being notified by the State.

**19. Employment Option.** If the State determines that it would be in the State's best interest to hire an employee of the Contractor, the Contractor will release the selected employee from any non-competition agreements that may be in effect. This release will be at no cost to the State or the employee.

**20. Force Majeure.** In the event that either party is unable to perform any of its obligations under this Contract or to enjoy any of its benefits because of natural disaster or decrees of governmental bodies not the fault of the affected party (hereinafter referred to as a "Force Majeure Event"), the party who has been so affected shall immediately or as soon as is reasonably possible under the circumstances give notice to the other party and shall do everything possible to resume performance. Upon receipt of such notice, all obligations under this Contract shall be immediately suspended. If the period of nonperformance exceeds thirty (30) days from the receipt of notice of the Force Majeure Event, the party whose ability to perform has not been so affected may, by giving written notice, terminate this Contract.

**21. Funding Cancellation.** As required by Financial Management Circular 3.3 and IC § 5-22-17-5, when the Director of the State Budget Agency makes a written determination that funds are not appropriated or otherwise available to support continuation of performance of this Contract, this Contract shall be canceled. A determination by the Director of State Budget Agency that funds are not appropriated or otherwise available to support continuation of performance shall be final and conclusive.

**22. Governing Law.** This Contract shall be governed, construed, and enforced in accordance with the laws of the State of Indiana, without regard to its conflict of laws rules. Suit, if any, must be brought in the State of Indiana.

**23. HIPAA Compliance.** If this Contract involves services, activities or products subject to the Health Insurance Portability and Accountability Act of 1996 (HIPAA), the Contractor covenants that it will appropriately safeguard Protected Health Information (defined in 45 CFR 160.103), and agrees that it is subject to, and shall comply with, the provisions of 45 CFR 164 Subpart E regarding use and disclosure of Protected Health Information.

**24. Indemnification.** The Contractor agrees to indemnify, defend, and hold harmless the State, its agents, officials, and employees from all third party claims and suits including court costs, attorney's fees, and other expenses caused by any act or omission of the Contractor and/or its subcontractors, if any, in the performance of this Contract. The State will not provide indemnification to the Contractor.

**25. Independent Contractor; Workers' Compensation Insurance.** The Contractor is performing as an independent entity under this Contract. No part of this Contract shall be construed to represent the creation of an employment, agency, partnership or joint venture agreement between the parties. Neither party will assume liability for any injury (including death) to any persons, or damage to any property,



arising out of the acts or omissions of the agents, employees or subcontractors of the other party. The Contractor shall provide all necessary unemployment and workers' compensation insurance for the Contractor's employees, and Contractor shall provide the State with a Certificate of Insurance evidencing such coverage prior to starting work under this Contract.

**26. ~~Indiana Veteran Owned Small Business Enterprise Compliance.~~** ~~Award of this Contract was based, in part, on the Indiana Veteran Owned Small Business Enterprise ("IVOSB") participation plan, as detailed in the IVOSB Subcontractor Commitment Form, commonly referred to as "Attachment A-1" in the procurement documentation and incorporated by reference herein. Therefore, any changes to this information during the Contract term must be approved by IDOA's Division of Supplier Diversity and may require an amendment. It is the State's expectation that the Contractor will meet the subcontractor commitments during the Contract term. The following certified IVOSB subcontractor(s) will be participating in this Contract: [Add additional IVOSBs using the same format.]~~

~~IVOSB \_\_\_\_\_ COMPANY NAME \_\_\_\_\_ PHONE \_\_\_\_\_ EMAIL OF CONTACT PERSON \_\_\_\_\_ PERCENT \_\_\_\_\_~~

~~Briefly describe the IVOSB service(s)/product(s) to be provided under this Contract and include the estimated date(s) for utilization during the Contract term:~~

~~A copy of each subcontractor agreement must be submitted to the Division of Supplier Diversity within thirty (30) days of the effective date of this Contract. The subcontractor agreements may be uploaded into Pay Audit (Indiana's subcontractor payment auditing system), emailed to [IndianaVeteransPreference@idoa.IN.gov](mailto:IndianaVeteransPreference@idoa.IN.gov), or mailed to IDOA, 402 W. Washington Street, Room W 462, Indianapolis, IN 46204. Failure to provide a copy of any subcontractor agreement may be deemed a violation of the rules governing IVOSB procurement and may result in sanctions allowable under 25 IAC 9-5-2. Requests for changes must be submitted to [IndianaVeteransPreference@idoa.IN.gov](mailto:IndianaVeteransPreference@idoa.IN.gov) for review and approval before changing the participation plan submitted in connection with this Contract.~~

~~The Contractor shall report payments made to certified IVOSB subcontractors under this Contract on a monthly basis using Pay Audit. The Contractor shall notify subcontractors that they must confirm payments received from the Contractor in Pay Audit. The Pay Audit system can be accessed on the IDOA webpage at: [www.in.gov/idoa/mwbe/payaudit.htm](http://www.in.gov/idoa/mwbe/payaudit.htm). The Contractor may also be required to report IVOSB-certified subcontractor payments directly to the Division of Supplier Diversity, as reasonably requested and in the format required by the Division of Supplier Diversity.~~

~~The Contractor's failure to comply with the provisions in this clause may be considered a material breach of the Contract.~~

**27. Information Technology Enterprise Architecture Requirements.** If this Contract involves information technology-related products or services, the Contractor agrees that all such products or services are compatible with any of the technology standards found at <https://www.in.gov/iot/2394.htm> that are applicable, including the assistive technology standard. The State may terminate this Contract for default if the terms of this paragraph are breached.

**28. Insurance.**

A. The Contractor and its subcontractors (if any) shall secure and keep in force during the term of this Contract the following insurance coverages (if applicable) covering the Contractor for any and all claims of any nature which may in any manner arise out of or result from Contractor's performance under this Contract:

1. Commercial general liability, including contractual coverage, and products or completed operations coverage (if applicable), with minimum liability limits not less than \$2,000,000 ~~per person and \$5,000,000 per occurrence unless additional coverage is required by the State.~~ The State is to be named as an additional insured on a primary, non-contributory basis for any liability arising directly or indirectly under or in connection with this Contract.
2. ~~If owned, non-owned, or hired autos are utilized in performance of services, Automobile liability for with minimum liability limits not less than \$700,000 per person and \$2,000,000 per occurrence. The State is to be named as an additional insured on a primary, non-contributory basis.~~
3. ~~Errors and Omissions liability with minimum liability limits of \$1,000,000 per claim and in the aggregate. Coverage for the benefit of the State shall continue for a period of two (2) years after the date of service provided under this Contract.~~
4. ~~If the Contractor is responsible for the management and oversight of various employee benefit plans and programs such as pensions, profit sharing and savings, Fiduciary liability with limits no less than \$700,000 per cause of action and \$5,000,000 in the aggregate.~~
5. ~~Valuable Papers coverage, if applicable, with an Inland Marine Policy Insurance with limits sufficient to pay for the re-creation and reconstruction of such records.~~
6. ~~Surety or Fidelity Bond(s) if required by statute or by the agency.~~
7. ~~Cyber Liability addressing risks associated with electronic transmissions, the internet, networks and informational assets, and having limits of no less than \$700,000 per occurrence and \$5,000,000 in the aggregate.~~

The Contractor shall provide proof of such insurance coverage by tendering to the undersigned State representative a certificate of insurance on request ~~prior to the commencement of this Contract~~ and proof of workers' compensation coverage meeting all statutory requirements of IC § 22-3-2 on request. In addition, proof of an "all states endorsement" covering claims occurring outside the State is required if any of the services provided under this Contract involve work outside of Indiana on request.

B. The Contractor's insurance coverage must meet the following additional requirements:

1. The insurer must have a certificate of authority or other appropriate authorization to operate in the state in which the policy was issued.
2. Any deductible or self-insured retention amount or other similar obligation under the insurance policies shall be the sole obligation of the Contractor.
3. The State will be defended, indemnified and held harmless to the full extent of any coverage actually secured by the Contractor in excess of the minimum requirements set forth above. The duty to indemnify the State under this Contract shall not be limited by the insurance required in this Contract.

4. The insurance required in this Contract, through a policy or endorsement(s), shall include a provision that the policy and endorsements may not be canceled or modified without thirty (30) days' prior written notice to the undersigned State agency.
  5. The Contractor waives and agrees to require their insurer to waive their rights of subrogation against the State of Indiana.
- C. Failure to provide insurance as required in this Contract may be deemed a material breach of contract entitling the State to immediately terminate this Contract. The Contractor shall furnish a certificate of insurance and all endorsements to the State on request. ~~before the commencement of this Contract.~~

## 29. Key Person(s).

- A. If both parties have designated that certain individual(s) are essential to the services offered, the parties agree that should such individual(s) leave their employment during the term of this Contract for whatever reason, the State shall have the right to terminate this Contract upon thirty (30) days' prior written notice.
- B. In the event that the Contractor is an individual, that individual shall be considered a key person and, as such, essential to this Contract. Substitution of another for the Contractor shall not be permitted without express written consent of the State.

Nothing in sections A and B, above shall be construed to prevent the Contractor from using the services of others to perform tasks ancillary to those tasks which directly require the expertise of the key person. Examples of such ancillary tasks include secretarial, clerical, and common labor duties. The Contractor shall, at all times, remain responsible for the performance of all necessary tasks, whether performed by a key person or others.

Key person(s) to this Contract is/are no key persons

**30. Licensing Standards.** The Contractor, its employees and subcontractors shall comply with all applicable licensing standards, certification standards, accrediting standards and any other laws, rules, or regulations governing services to be provided by the Contractor pursuant to this Contract. The State will not pay the Contractor for any services performed when the Contractor, its employees or subcontractors are not in compliance with such applicable standards, laws, rules, or regulations. If any license, certification or accreditation expires or is revoked, or any disciplinary action is taken against an applicable license, certification, or accreditation, the Contractor shall notify the State immediately and the State, at its option, may immediately terminate this Contract.

**31. Merger & Modification.** This Contract constitutes the entire agreement between the parties. No understandings, agreements, or representations, oral or written, not specified within this Contract will be valid provisions of this Contract. This Contract may not be modified, supplemented, or amended, except by written agreement signed by all necessary parties.

## 32. Minority and Women's Business Enterprises Compliance.

~~Award of this Contract was based, in part, on the Minority and/or Women's Business Enterprise ("MBE" and/or "WBE") participation plan as detailed in the Minority and Women's Business Enterprises Subcontractor Commitment Form, commonly referred to as "Attachment A" in the procurement documentation and incorporated by reference herein. Therefore, any changes to this information during~~



~~the Contract term must be approved by Division of Supplier Diversity and may require an amendment. It is the State's expectation that the Contractor will meet the subcontractor commitments during the Contract term.~~

~~The following Division of Supplier Diversity certified MBE and/or WBE subcontractors will be participating in this Contract. [Add additional MBEs and WBEs using the same format.]~~

~~MBE or WBE      COMPANY NAME      PHONE      EMAIL OF CONTACT PERSON      PERCENT~~

~~Briefly describe the MBE and/or WBE service(s)/product(s) to be provided under this Contract and include the estimated date(s) for utilization during the Contract term.~~

~~A copy of each subcontractor agreement must be submitted to the Division of Supplier Diversity within thirty (30) days of the effective date of this Contract. The subcontractor agreements may be uploaded into Pay Audit (Indiana's subcontractor payment auditing system), emailed to [MWBECompliance@idoa.IN.gov](mailto:MWBECompliance@idoa.IN.gov), or mailed to Division of Supplier Diversity, 402 W. Washington Street, Room W 462, Indianapolis IN 46204. Failure to provide a copy of any subcontractor agreement may be deemed a violation of the rules governing MBE/WBE procurement and may result in sanctions allowable under 25 IAC 5-7-8. Requests for changes must be submitted to [MWBECompliance@idoa.IN.gov](mailto:MWBECompliance@idoa.IN.gov) for review and approval before changing the participation plan submitted in connection with this Contract.~~

~~The Contractor shall report payments made to Division of Supplier Diversity certified subcontractors under this Contract on a monthly basis using Pay Audit. The Contractor shall notify subcontractors that they must confirm payments received from the Contractor in Pay Audit. The Pay Audit system can be accessed on the IDOA webpage at: [www.in.gov/idoa/mwbc/payaudit.htm](http://www.in.gov/idoa/mwbc/payaudit.htm). The Contractor may also be required to report Division of Supplier Diversity certified subcontractor payments directly to the Division, as reasonably requested and in the format required by the Division of Supplier Diversity.~~

~~The Contractor's failure to comply with the provisions in this clause may be considered a material breach of the Contract.~~

**33. Nondiscrimination.** Pursuant to the Indiana Civil Rights Law, specifically IC § 22-9-1-10, and in keeping with the purposes of the federal Civil Rights Act of 1964, the Age Discrimination in Employment Act, and the Americans with Disabilities Act, the Contractor covenants that it shall not discriminate against any employee or applicant for employment relating to this Contract with respect to the hire, tenure, terms, conditions or privileges of employment or any matter directly or indirectly related to employment, because of the employee's or applicant's race, color, national origin, religion, sex, age, disability, ancestry, status as a veteran, or any other characteristic protected by federal, state, or local law ("Protected Characteristics"). The Contractor certifies compliance with applicable federal laws, regulations, and executive orders prohibiting discrimination based on the Protected Characteristics in the provision of services. Breach of this paragraph may be regarded as a material breach of this Contract, but nothing in this paragraph shall be construed to imply or establish an employment relationship between the State and any applicant or employee of the Contractor or any subcontractor.

The State is a recipient of federal funds, and therefore, where applicable, the Contractor and any subcontractors shall comply with requisite affirmative action requirements, including reporting, pursuant

to 41 CFR Chapter 60, as amended, and Section 202 of Executive Order 11246 as amended by Executive Order 13672.

**34. Notice to Parties.** Whenever any notice, statement or other communication is required under this Contract, it will be hand-delivered or sent by first-class U.S. mail service, or commercial courier service to the following addresses, unless otherwise specifically advised.

A. Notices to the State shall be sent to:

**Jerold A. Bonnet, General Counsel  
Office of the Indiana Secretary of State  
200 W. Washington St. Room 201  
Indianapolis, IN 46204**

B. Notices to the Contractor shall be sent to:

**Prabode Weebadde, CEO  
Venturit, Inc.  
325 East Grand River, Suite 225  
East Lansing, MI 48823**

As required by IC § 4-13-2-14.8, payments to the Contractor shall be made via electronic funds transfer in accordance with instructions filed by the Contractor with the Indiana Auditor of State.

**35. Order of Precedence; Incorporation by Reference.** Any inconsistency or ambiguity in this Contract shall be resolved by giving precedence in the following order: (1) this Contract, (2) attachments prepared by the State, (3) State's RFP or RFQ if any, (4) Contractor's response to State's RFP or RFQ if any, and (5) attachments prepared by the Contractor. All attachments, and all documents referred to in this paragraph, are hereby incorporated fully by reference.

**36. Ownership of Documents and Materials.**

A. All documents, records, programs, applications, data, algorithms, film, tape, articles, memoranda, and other materials (the "Materials") not developed or licensed by the Contractor prior to execution of this Contract, but specifically developed under this Contract shall be considered "work for hire" and the Contractor hereby transfers and assigns any ownership claims to the State so that all Materials will be the property of the State. If ownership interest in the Materials cannot be assigned to the State, the Contractor grants the State a non-exclusive, non-cancelable, perpetual, worldwide royalty-free license to use the Materials and to use, modify, copy and create derivative works of the Materials.

B. Use of the Materials, other than related to contract performance by the Contractor, without the prior written consent of the State, is prohibited. During the performance of this Contract, the Contractor shall be responsible for any loss of or damage to the Materials developed for or supplied by the State and used to develop or assist in the services provided while the Materials are in the possession of the Contractor. Any loss or damage thereto shall be restored at the Contractor's expense. The Contractor shall provide the State full, immediate, and unrestricted access to the Materials and to Contractor's work product during the term of this Contract.

**37. Payments.**

A. All payments shall be made thirty-five (35) days in arrears in conformance with State fiscal policies and procedures and, as required by IC § 4-13-2-14.8, the direct deposit by electronic funds transfer to the financial institution designated by the Contractor in writing unless a specific waiver has been obtained



from the Indiana Auditor of State. No payments will be made in advance of receipt of the goods or services that are the subject of this Contract except as permitted by IC § 4-13-2-20.

B. If the Contractor is being paid in advance for the maintenance of equipment, software or a service as a subscription, then pursuant to IC § 4-13-2-20(b)(14), the Contractor agrees that if it fails to fully provide or perform under this Contract, upon receipt of written notice from the State, it shall promptly refund the consideration paid, pro-rated through the date of non-performance.

**38. Penalties/Interest/Attorney's Fees.** The State will in good faith perform its required obligations hereunder and does not agree to pay any penalties, liquidated damages, interest or attorney's fees, except as permitted by Indiana law, in part, IC § 5-17-5, IC § 34-54-8, IC § 34-13-1 and IC § 34-52-2.

Notwithstanding the provisions contained in IC § 5-17-5, any liability resulting from the State's failure to make prompt payment shall be based solely on the amount of funding originating from the State and shall not be based on funding from federal or other sources.

**39. Progress Reports.** The Contractor shall submit progress reports to the State upon request. The report shall be oral, unless the State, upon receipt of the oral report, should deem it necessary to have it in written form. The progress reports shall serve the purpose of assuring the State that work is progressing in line with the schedule, and that completion can be reasonably assured on the scheduled date.

**40. Public Record.** The Contractor acknowledges that the State will not treat this Contract as containing confidential information and the State will post this Contract on the transparency portal as required by Executive Order 05-07 and IC § 5-14-3.5-2. Use by the public of the information contained in this Contract shall not be considered an act of the State.

**41. Renewal Option.** This Contract may be renewed under the same terms and conditions, subject to the approval of the Commissioner of the Department of Administration and the State Budget Director in compliance with IC § 5-22-17-4. The term of the renewed contract may not be longer than the term of the original Contract.

**42. Severability.** The invalidity of any section, subsection, clause or provision of this Contract shall not affect the validity of the remaining sections, subsections, clauses or provisions of this Contract.

**43. Substantial Performance.** This Contract shall be deemed to be substantially performed only when fully performed according to its terms and conditions and any written amendments or supplements.

**44. Taxes.** The State is exempt from most state and local taxes and many federal taxes. The State will not be responsible for any taxes levied on the Contractor as a result of this Contract.

**45. Termination for Convenience.** This Contract may be terminated, in whole or in part, by the State, which shall include and is not limited to IDOA and the State Budget Agency whenever, for any reason, the State determines that such termination is in its best interest. Termination of services shall be effected by delivery to the Contractor of a Termination Notice at least thirty (30) days prior to the termination effective date, specifying the extent to which performance of services under such termination becomes effective. The Contractor shall be compensated for services properly rendered prior to the effective date of termination. The State will not be liable for services performed after the effective date of termination. The Contractor shall be compensated for services herein provided but in no case shall total payment made to the Contractor exceed the original contract price or shall any price increase be allowed on individual line items if canceled only in part prior to the original termination date. For the purposes of this paragraph, the parties stipulate and agree that IDOA shall be deemed to be a party to this Contract with

authority to terminate the same for convenience when such termination is determined by the Commissioner of IDOA to be in the best interests of the State.

**46. Termination for Default.**

A. With the provision of thirty (30) days' notice to the Contractor, the State may terminate this Contract in whole or in part if the Contractor fails to:

1. Correct or cure any breach of this Contract; the time to correct or cure the breach may be extended beyond thirty (30) days if the State determines progress is being made and the extension is agreed to by the parties;
2. Deliver the supplies or perform the services within the time specified in this Contract or any extension;
3. Make progress so as to endanger performance of this Contract; or
4. Perform any of the other provisions of this Contract.

B. If the State terminates this Contract in whole or in part, it may acquire, under the terms and in the manner the State considers appropriate, supplies or services similar to those terminated, and the Contractor will be liable to the State for any excess costs for those supplies or services. However, the Contractor shall continue the work not terminated.

C. The State shall pay the contract price for completed supplies delivered and services accepted. The Contractor and the State shall agree on the amount of payment for manufacturing materials delivered and accepted and for the protection and preservation of the property. Failure to agree will be a dispute under the Disputes clause. The State may withhold from these amounts any sum the State determines to be necessary to protect the State against loss because of outstanding liens or claims of former lien holders.

D. The rights and remedies of the State in this clause are in addition to any other rights and remedies provided by law or equity or under this Contract.

**47. Travel.** No expenses for travel will be reimbursed unless specifically authorized by this Contract. Permitted expenses will be reimbursed at the rate paid by the State and in accordance with the *Indiana Department of Administration Travel Policy and Procedures* in effect at the time the expenditure is made. Out-of-state travel requests must be reviewed by the State for availability of funds and for conformance with *Travel Policy* guidelines.

**48. Waiver of Rights.** No right conferred on either party under this Contract shall be deemed waived, and no breach of this Contract excused, unless such waiver is in writing and signed by the party claimed to have waived such right. Neither the State's review, approval or acceptance of, nor payment for, the services required under this Contract shall be construed to operate as a waiver of any rights under this Contract or of any cause of action arising out of the performance of this Contract, and the Contractor shall be and remain liable to the State in accordance with applicable law for all damages to the State caused by the Contractor's negligent performance of any of the services furnished under this Contract.

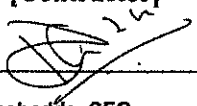
**49. Work Standards.** The Contractor shall execute its responsibilities by following and applying at all times the highest professional and technical guidelines and standards. If the State becomes dissatisfied with the work product of or the working relationship with those individuals assigned to work on this Contract, the State may request in writing the replacement of any or all such individuals, and the Contractor shall grant such request.

**50. State Boilerplate Affirmation Clause.** I swear or affirm under the penalties of perjury that I have not altered, modified, changed or deleted the State's standard contract clauses (as contained in *2022 SCM Template*) in any way except as follows: ***Paragraphs 26, 28, and 32.***

**Non-Collusion and Acceptance**

The undersigned attests, subject to the penalties for perjury, that the undersigned is the Contractor, or that the undersigned is the properly authorized representative, agent, member or officer of the Contractor. Further, to the undersigned's knowledge, neither the undersigned nor any other member, employee, representative, agent or officer of the Contractor, directly or indirectly, has entered into or been offered any sum of money or other consideration for the execution of this Contract other than that which appears upon the face hereof. Furthermore, if the undersigned has knowledge that a state officer, employee, or special state appointee, as those terms are defined in IC § 4-2-6-1, has a financial interest in the Contract, the Contractor attests to compliance with the disclosure requirements in IC § 4-2-6-10.5.

In Witness Whereof, the Contractor and the State have, through their duly authorized representatives, entered into this Contract. The parties, having read and understood the foregoing terms of this Contract, do by their respective signatures dated below agree to the terms thereof.

**Venturit, Inc. [Contractor]**By:  \_\_\_\_\_

Dr. Prabode Weebadde, CEO

Name and Title, Printed

Date: 08/04/2025**Indiana Secretary of State [Indiana Agency]**By:  \_\_\_\_\_  
Jerold A. Bonnet, Deputy Secretary of StateDate: 8-13-25





## Attachment B

### Performance Terms and Conditions

Pursuant to Indiana Code 5-37.5 “Fiscal Integrity and Contract Accountability” Vendor agrees to the following:

1. **Independent Assessment.** At the discretion of the State, Contractor’s complete and timely delivery of goods and services will be subject to assessment of deficiency pursuant to requirements in Attachment A, including time of delivery, completeness, and functionality, by RSM US LLP, the State’s independent contract review contractor.
2. **Assessment Deficiencies.** Notice of deficiencies in complete and timely delivery of goods and services will be communicated to Contractor in writing by the State within 5 business days of receipt by the State.
3. **Response, resolution or correction.** Upon receipt of notice of deficiency in timely, complete, and functional delivery of goods and services, Contractor will have 5 business days to provide a satisfactory response to the assessment of deficiencies, and a plan of resolution if applicable. Contractor will have 30 days from the date of notice of a deficiency to correct or otherwise resolve the deficiency to the satisfaction of the State.
4. **Assessment of Liquidated Damages.** Any deficiency not resolved to the satisfaction of the State within 30 days of notice may be subject to full or partial suspension of payment and assessment of Liquidated Damages in addition to any remedies under the Contract. The State may suspend payment for any goods or services under this contract assessed as being deficient for a period not to exceed 120 days. The State may assess and deduct as liquidated damages an amount equal to 5% per month of invoiced amounts for goods or services assessed as being deficient, which remain unresolved after 30 days notice, up to a total maximum of 15%. Payment for all or part of an invoice for which payment has been suspended due to assessment of deficiency will be made promptly upon resolution of the deficiency.



EOS A27-26-009

20-000

ATTACHMENT A



**venturit.**

Fast-Track Digital Innovation

**Date:** June 27, 2025

**To:**

Indiana Secretary of State  
Attn: Procurement Division  
200 W. Washington St., Room 201  
Indianapolis, IN 46204

**Subject:** Response to RFP #SOS-26-006 – Notary Modernization

Dear Procurement Review Committee,

On behalf of Venturit, Inc., we are pleased to submit our response to **RFP #SOS-26-006 – Notary Modernization**. Our proposal, titled *"Proposal to Expand INBIZ LMS Platform for Applicant & Certificate Management and Business Workflow Enhancements"*, outlines a robust, secure, and scalable solution that addresses all mandatory and desired requirements identified in the RFP.

Our solution is purpose-built for the State of Indiana using Wizdn—a modular, microservices-based framework that aligns with INBIZ's existing ecosystem and the modernization objectives outlined in the RFP.

Please find below a matrix cross-referencing your RFP requirements with the corresponding sections of our proposal:

**1. RFP Requirements Compliance Matrix**

Section 1.3	Integration with existing INBIZ infrastructure and workflows	pages 2–4, System Architecture Overview	Yes
Section 1.4	Support for credentialing lifecycle: application, issuance, renewal, revocation	pages 5–6, Applicant Portal and Credential Management Modules	yes

Section 1.5	Digital certificate issuance with secure verification	age 6, Blockchain-ready digital Certificates and Lifecycle Tracking	Yes
1.6	education (2, 4, 6-year cycles)	Integration with CE Tracking	
Section 1.7	Interoperability with Remote Notary Platform & LMS	age 9, Seamless Enrollment + RON	Yes
Section 2.2.2	Notifications & compliance alerts (renewal, inactivity, etc.)	age 7, Engagement & Notification Engine	Yes
Section 3.3	Role-based access control, audit logging, encryption	age 10, Security Architecture (Zero Trust, BAC, Encryption)	Yes
Section 3.4	Cloud-native infrastructure with scalability and disaster recovery	age 10–11, GCP Cloud Architecture + Redundancy	Yes

## 2. Closing

We appreciate the opportunity to continue our partnership with the Indiana Secretary of State in modernizing the notary commissioning and education system. Having already implemented the INBiz LMS platform, we are confident that our proposed expansion offers the technical strength, scalability, and compliance assurance the State requires. Should you have any questions or need further clarification, please do not hesitate to contact us.

Sincerely,

Dr. Prabode Weebadde

**Venturit Inc.**

Founder, CEO & Chief Architect

Email: [prabode@venturit.com](mailto:prabode@venturit.com) | Phone: 517-214-9041



**venturit.**

First-Track Digital Innovation



**venturit.**

Fast-Track Digital Innovation

# **Response to Request to Proposal ID: SOS-26-006**

**Proposal to Expand INBIZ LMS Platform for  
Applicant & Certificate Management and  
Business Workflow Enhancements**

**Presented by:**

**Venturit Inc.**

**To:** Indiana Secretary of State's Office

**Date:** June 27, 2025

**SOS Indiana Contact**

Email: SOSProcurement@sos.IN.gov

**Venturit Contact**

Dr. Prabode Weebadde, Founder, CEO & Chief Architect

Email: prabode@venturit.com | Phone: 517-214-9041

## 1. Executive Summary

Venturit is pleased to propose a strategic enhancement of the current INBIZ Learning Management System (LMS) platform through the integration of a comprehensive Applicant and Certificate Management ecosystem. This expansion leverages our scalable Wizdn framework to unify the currently siloed notary application process—now managed by IPLA—within the LMS.

### **The enhanced platform will introduce:**

- Dynamic, rule-based application form creation, enabling rapid configuration for new credentialing workflows
- AI-driven document validation agents for real-time compliance screening and fraud detection
- Secure, automated issuance and management of digital credentials and certificates
- An integrated data lake with advanced analytics capabilities, exposing a robust API layer for cross-agency and third-party interoperability

This modernization effort will reduce administrative burden, streamline compliance with 75 IAC regulations, and significantly improve user and agency transparency. The architecture is cloud-native, secure by design, and built for extensibility—positioning the platform to support additional credentialing programs beyond Notary Public services.



## 2. Introduction

Our technical assessment of IPLA's current notary credentialing process surfaced significant opportunities for modernization. The existing workflows are fragmented, heavily manual, and operate across siloed systems. These conditions not only slow down application processing but also increase the risk of compliance gaps and operational inefficiencies.

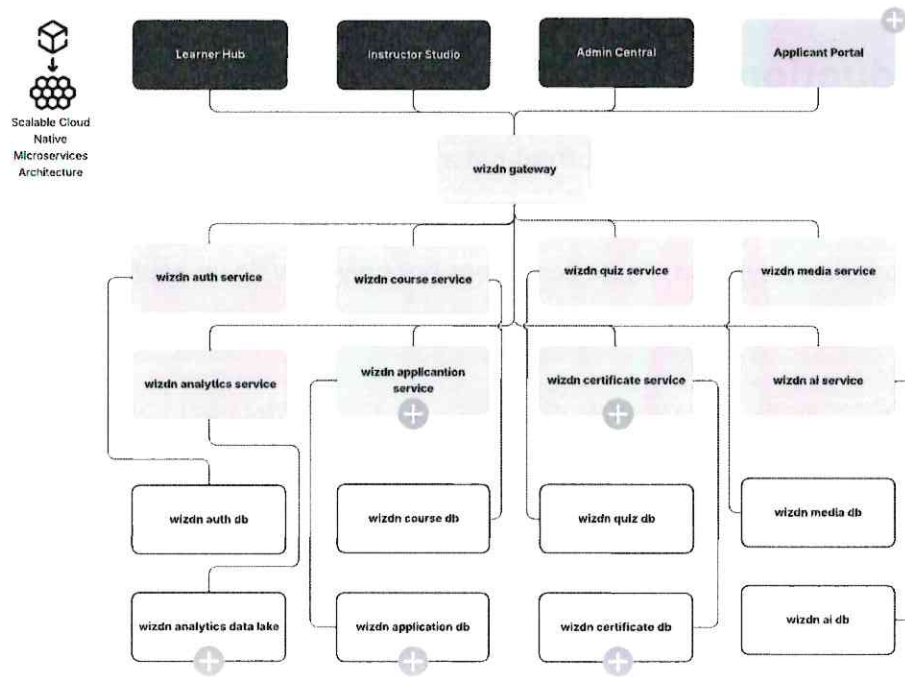
To address these challenges, Venturit proposes a next-generation enhancement of the INBIZ LMS platform. The enhanced system consolidates the full lifecycle of notarial engagement—from initial application to credential issuance, renewal, and continuing education—into a unified, cloud-native platform. At the core of this modernization are AI-powered validation agents, automated digital credential issuance, and lifecycle management services built on scalable microservices.

### 1.1 Proposed Architecture Expansion

As depicted in **Figure 1**, Venturit will expand the existing INBIZ Wizdn framework by introducing:

- **A new Applicant Portal frontend**
- **Wizdn Application Microservice** and associated **Application Database**
- **Wizdn Certificate Microservice** and **Certificate Database**
- Refactoring of the existing **Wizdn Analytics Database** into a **centralized Analytics Data Lake**

These components will be seamlessly integrated with existing core modules—Learner Hub, Admin Central, and Instructor Studio—ensuring backward compatibility and extensibility. The new services are designed to support adaptive credentialing models and will enable self-service workflows for future licensing programs beyond notary services.

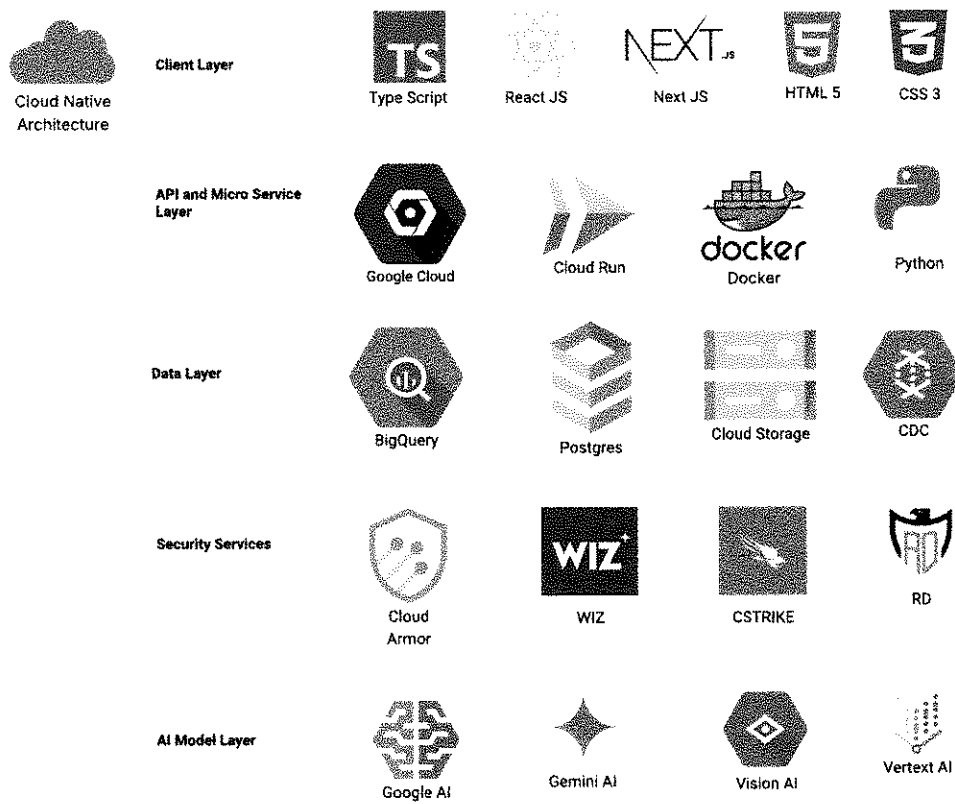
**Figure 1. Proposed Expansion of INBIZ Wizdn Framework**

## 1.2 Cloud-Native Foundation

This modernization is anchored in a resilient, scalable architecture built on **Google Cloud Platform (GCP)** technologies—aligned with the Indiana Secretary of State’s cloud standards. The Wizdn framework, as shown in **Figure 2**, adheres to zero trust security principles, containerized microservices, and modern DevOps best practices.

Each architectural layer—client, API/microservices, data, and AI—utilizes stable, industry-proven technologies including **Cloud Run**, **Change Data Capture**, **BigQuery**, **Cloud Armor**, and **Vertex AI** to ensure robust performance, security, and operational agility.

Figure 2. Cloud-Native Architecture of INBIZ Wizdn Framework



## 3. Proposed Enhancements

### 3.1 Applicant Application Process Modernization

The proposed **Applicant Portal**, powered by the Wizdn framework, introduces a streamlined, intelligent front-end for managing notarial applications across multiple pathways—including Public Notary, Remote Notary, and Renewal of Commission. This upgrade empowers Business Services Division (I) staff with configuration-driven tools and automates front-end validation to ensure applicants submit complete, compliant applications—reducing downstream administrative overhead.

#### Key Features

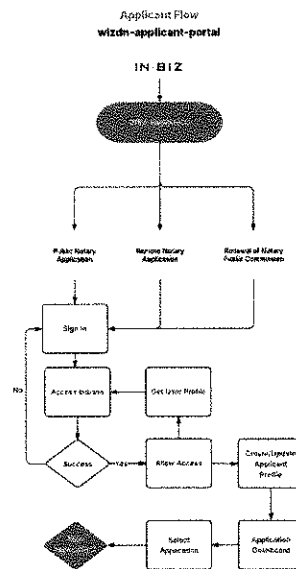
- **Dynamic Form Builder:** Staff can create and manage application types through configurable templates, including input field definitions, conditional logic, and document upload requirements.
- **AI-Powered Pre-Validation:** Leveraging **Vertex Vision AI** and Gemini AI agents, the system performs real-time validation of critical documents such as:
  - Surety bonds
  - Criminal history records
  - Handwritten signatures
- **Intelligent Application Staging:** Applications that pass AI validation are automatically staged for final human review in the Admin Central dashboard, prioritizing those most likely to be approved.

#### Value Justification

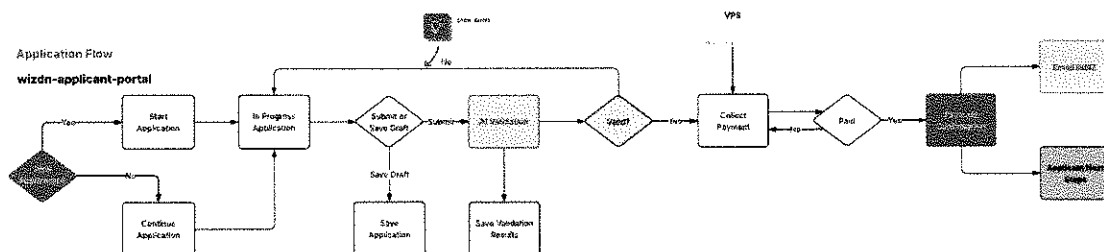
This approach reduces manual workload by automating verification tasks that traditionally represent **60–70% of back-office processing time**. By filtering out incomplete or invalid applications upfront, BSD can:

- Accelerate application turnaround times
- Improve accuracy and compliance consistency
- Free up staff to focus on complex or exception cases
- Increase applicant satisfaction through clearer, faster pathways

**Figure 3. Applicant Portal Authentication and Profile Flow**



**Figure 4. Application Submission, AI Validation, and Payment Workflow**



### 3.2 Document Management System

The proposed platform includes a **fully integrated, secure Document Management System (DMS)** that serves as the backbone for document intake, storage, and validation. Designed to handle high-assurance credentialing workflows, the DMS ensures both applicants and administrators can confidently manage sensitive materials—from surety bonds to identity documents—with audit-ready transparency.

#### Key Features

- **Real-Time Document Upload & Indexing:** Applicants can upload documents in a secure, guided workflow. Files are auto-tagged with metadata, versioned, and categorized for contextual tracking.
- **End-to-End Encryption & Access Control:** Documents are encrypted at rest and in transit using enterprise-grade protocols. Role-based access ensures that only authorized personnel can view or handle sensitive materials.
- **Workflow-Aware Validation Pipelines:** Documents are automatically routed to predefined review stages. For example, notarized affidavits or background checks may trigger AI-based pre-screening followed by targeted human verification.
- **Immutable Audit Trail & Retention Compliance:** Every interaction with a file—upload, view, annotate, verify, reject—is logged immutably for forensic traceability and long-term retention governance.

#### Business Benefits

- **Compliance Assurance:** The centralized DMS architecture ensures traceability and retention standards required under **75 IAC** and other credentialing statutes.
- **Operational Efficiency:** By eliminating fragmented file handling and email-based submissions, the DMS drastically reduces the risk of misplaced or misrouted documents.



- **Scalable Credentialing Backbone:** The modular design supports future expansion to other regulated credentialing programs—whether licensure, certifications, or renewals—without re-architecting the system.

### 3.3 Intelligent Notifications & Engagement Engine

To ensure continuous engagement and reduce process drop-off, the platform includes an **intelligent, rule-driven notification engine** that proactively communicates with applicants and administrators throughout the entire credentialing lifecycle. This system supports automated outreach, renewal alerts, document correction notices, and workflow status updates—all with audit-ready visibility.

#### Key Features

- **Rules-Based Trigger System:** Notifications are sent based on configurable rules tied to applicant behavior, deadlines, workflow milestones, or validation outcomes. Examples include:
  - Missing or invalid document uploads
  - Upcoming renewal deadlines
  - Application inactivity thresholds
  - AI validation failures with correction guidance
- **Staff-Configurable Messaging Templates:** Admins can create and manage branded, context-aware templates for email and in-platform notifications. These can be tailored by application type, status, or error category.
- **Multi-Channel Delivery:** Notifications can be sent via email, SMS (optional), or embedded alerts within the applicant dashboard—ensuring timely delivery regardless of the applicant's preferred communication channel.
- **Compliant Audit Logging:** All notifications are logged with timestamps, delivery status, and read confirmations where applicable, supporting full transparency and regulatory compliance.

## Strategic Impact

- **Minimized Abandonment:** Proactive nudges and milestone reminders reduce incomplete or stalled applications—accelerating processing time and throughput.
- **Improved Compliance:** Renewal alerts and deadline-driven communications reduce lapses in credential validity, helping maintain regulatory compliance.
- **Enhanced User Experience:** Clear, consistent messaging reduces confusion, boosts applicant confidence, and increases satisfaction with the overall process

## 3.4 Licensing & Certificate Lifecycle Management

The platform introduces a **comprehensive, end-to-end credential lifecycle system** designed to manage the issuance, renewal, revocation, and verification of notarial licenses and digital certificates. It provides real-time visibility into status changes, enforces audit compliance, and securely generates tamper-proof credentials tied to a unique cryptographic identity.

### Key Features

- **Status Lifecycle Tracking:** Automates the transition between all credential states—including Initial Issuance, Active, Suspended, Expired, Revoked, or Renewed—based on rule-based workflows and administrative triggers.
- **Digital Certificate Generation & Distribution:** Issues secure, tamper-evident digital certificates with:
  - Unique alphanumeric identifiers
  - Embedded metadata (e.g., commission dates, jurisdiction, renewal history)
  - Role-based expiration and renewal logic
  - Secure delivery through applicant dashboards or email
- **Blockchain-Ready Verification Layer (optional):** Enables instant, third-party validation of certificate authenticity through public ledger integration or API-based verification tools.

- **Immutable Logging & Chain of Custody:** Every issuance, renewal, or change is recorded in an auditable log with time-stamping, actor traceability, and historical versioning.

### **Justification for Investment**

Manual credentialing processes—particularly those involving renewals, suspensions, or conditional statuses—are highly vulnerable to clerical errors, data mismatches, and compliance delays. By automating certificate lifecycle management, the system:

- **Ensures legal enforceability and data integrity** across all credentialing events
- **Eliminates paper-based backlogs and human error** in license status tracking
- **Strengthens transparency** for regulators and applicants alike
- **Accelerates processing time**, improving service delivery without sacrificing compliance

This module transforms credentialing into a digitally verifiable, low-risk, high-efficiency process—supporting not just notary licensing, but any future credential program expansion.

## **3.5 Learner Hub Integration for Credentialing Readiness**

The **INBIZ Learner Hub** serves as the centralized learning and assessment environment for all credentialed training programs, including the Indiana Notary Public education and certification pathway. Seamlessly integrated with the Applicant Portal, it automates the enrollment, learning, and examination experience—ensuring that all qualified applicants are guided through required training with minimal staff intervention.

### **Key Features**

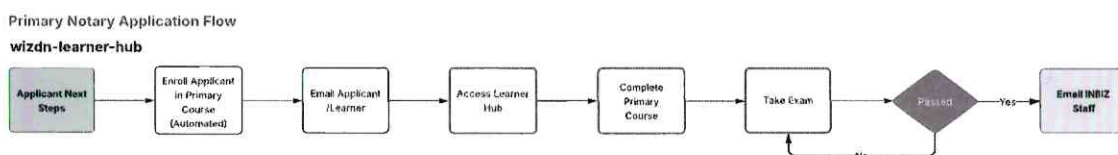
- **Automated Course Enrollment:** Once an applicant is approved or pre-cleared, the system auto-enrolls them into the appropriate notary education course—removing manual steps for staff and reducing processing delays.

- **Intelligent Progress Tracking:** Learner progress, quiz performance, and exam eligibility are tracked in real time, feeding data back to BSD Staff dashboards for oversight and audit purposes.
- **Self-Service Course Access:** Applicants receive secure login credentials via email and are directed to the Learner Hub interface where they can:
  - Access course content
  - Complete required modules
  - Take the certification exam
- **Auto-Trigger on Completion:** Passing the exam automatically triggers workflow actions such as:
  - Issuance of completion certificate
  - Notification to BSD Staff
  - Advancement to credential issuance queue

### Operational Benefits

- **Staff Efficiency:** Eliminates manual course assignment and exam scheduling, freeing staff to focus on complex applicant scenarios or escalations.
- **Compliance Alignment:** Ensures that all applicants meet mandatory education and examination requirements per Indiana state law, with audit-logged evidence of completion.
- **Scalability:** The integration model supports additional licensing programs beyond notary education by simply attaching new course tracks to the enrollment engine.
- 

**Figure 5. Applicant Portal Integration with Learner Hub – Notary Course Workflow**



### 3.5.1 Remote Online Notary (RON) Credentialing Track

The **RON Notary track** reflects the additional training and regulatory expectations placed on notaries performing remote notarizations. This flow is isolated from the standard notary application and includes a tailored course, distinct AI validations, and a standalone exam path.

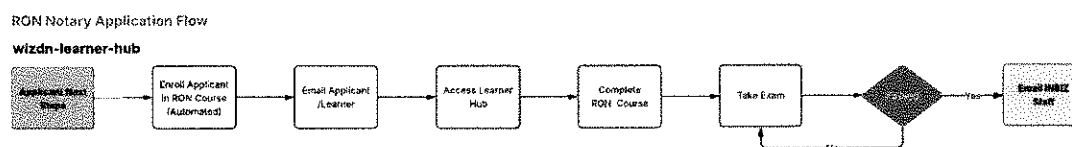
#### Key Features

- Automated enrollment in the RON course upon qualification
- Separate certification and credentialing pipeline
- Real-time status updates to BSD Staff upon exam completion
- Validations for RON eligibility before enrollment (e.g., prerequisite notary status)

#### Strategic Value

- Ensures RON applicants complete state-required education
- Reduces risk of unauthorized or unqualified RON activity
- Simplifies future audits of remote notary eligibility and training completion

**Figure 6. Applicant Portal Integration with Learner Hub – Notary RON Course Workflow**



### 3.5.2 Continuing Education (CE) Automation

Indiana requires notaries to complete **Continuing Education (CE)** at the 2, 4, and 6-year marks of their commission. The Wizdn platform automates this timeline with proactive assignment,



notification, and verification capabilities—ensuring statutory compliance without manual oversight.

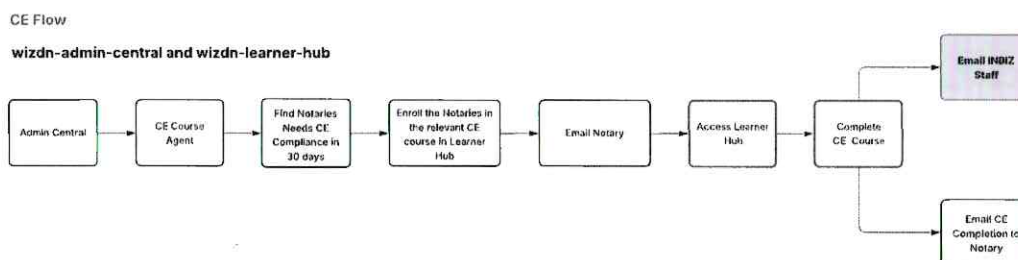
## Key Features

- **Automated CE Tracking Agent** identifies notaries due for CE in the next 30 days
- **Auto-assignment of CE courses** through Learner Hub
- **Multi-channel notifications** (email, dashboard alerts) to remind notaries of due dates
- Real-time staff dashboard visibility into CE compliance status
- Secure CE completion logging and automated proof-of-completion emails

## ROI Justification

- Reduces missed CE deadlines that could lead to **credential lapses or legal noncompliance**
- Removes staff burden of manually tracking and notifying thousands of notaries
- Centralizes CE records for **easy auditing and regulatory reporting**

**Figure 7. Applicant Portal Integration with Learner Hub – CE Course Workflow**



## 3.6 Notary Profile Dashboard

The INBIZ Learner Hub will feature an enhanced **Notary Profile Dashboard**—a personalized, secure interface designed to give applicants and active notaries a 360° view of their credentialing lifecycle. This single-point-of-access approach replaces the fragmented, multi-

system experience that often leads to confusion, missed deadlines, and redundant staff support requests.

## **Why Consolidation Matters**

Many public-sector credentialing systems distribute information across multiple portals—application status in one, CE in another, learning in a third. This fragmentation frustrates users, increases drop-off rates, and burdens support teams with avoidable inquiries. A consolidated profile solves these issues by aligning with **modern UX standards**, which emphasize:

- **Centralization of task-critical information**
- **Persistent context across workflows**
- **Personalized, actionable notifications**
- **Self-service empowerment with minimal friction**

This upgrade supports **WCAG and NIST usability guidelines**, promoting both accessibility and efficiency.

## **Key Features of the Enhanced Profile Dashboard**

- **Credential Timeline & Application History**  
A chronological log of submitted applications, status changes (e.g., active, expired, suspended), and certificate issuances, each with timestamped metadata and downloadable proof of completion.
- **Continuing Education Tracking & Alerts**  
Real-time CE progress indicators, upcoming deadline warnings, and overdue flags, supported by automated reminders to prevent non-compliance.
- **AI-Powered Learning Recommendations**  
Based on user behavior and lifecycle stage, the dashboard surfaces personalized course suggestions—such as refresher training, new RON requirements, or optional credentialing programs.

- **Digital Wallet for Certificates & Verifications**

A downloadable, verifiable record of notary certificates, which can be presented for validation to third parties via QR code or secure link.

- **Integrated Support & Feedback Loop**

Embedded help prompts, quick links to knowledge base articles, and feedback submission to improve the experience over time.

### **User and Business Impact**

- **Increases User Confidence and Satisfaction**

Users can see everything related to their credentials in one place—no more guessing where to go or what’s due.

- **Reduces Helpdesk Load**

When users don’t have to call or email for basic information like CE status or course access, administrative staff can focus on more complex issues.

- **Supports Lifecycle Management at Scale**

Whether it's a new notary or a 6-year veteran due for renewal, the profile grows with the user—reducing confusion and improving compliance throughout the journey.

### **3.6 BSD Staff Capabilities & Workflow Automation**

The Wizdn platform not only streamlines the applicant experience—it also **transforms BSD Staff operations** by automating key back-office tasks and enabling intuitive, no-code configuration tools. These capabilities enhance productivity, ensure consistent compliance handling, and elevate service delivery to Indiana’s notary public community.

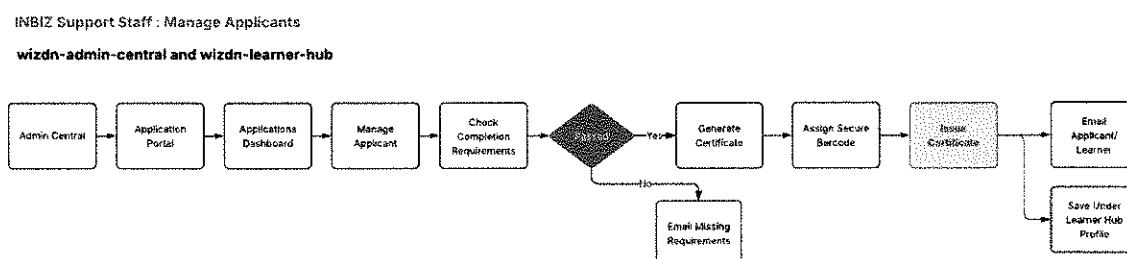
### 3.6.1 Credential Issuance Workflow Automation

Following successful course and exam completion, the system automatically queues approved applicants for certificate generation. BSD support staff are notified via Admin Central and presented with a pre-validated action panel containing:

- Applicant name and status
- Digital credential details
- Completion metadata
- Secure barcode assignment module

Once reviewed, staff can issue the digital certificate with one click, triggering secure delivery and archiving it within the applicant's Learner Hub profile.

**Figure 8. Certificate Issuance Flow via Admin Central**



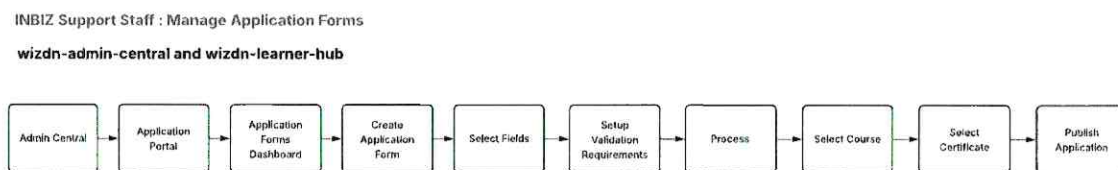
#### Key Benefits:

- **Reduces human error** and processing lag in final-stage approvals
- **Accelerates turnaround** from “exam passed” to “credential issued”
- **Eliminates back-and-forth emails**, as the system validates readiness automatically
- **Improves end-user experience** by shortening the final wait for credential delivery
- **Minimizes workload spikes** during peak application seasons with scalable queues

### 3.6.2 Application Form Management – No-Code Interface

Through **Admin Central**, BSD Staff can build, configure, and publish new application forms using a point-and-click interface—no technical skills required. Form builders can select fields, set validation requirements, define business logic, attach credential or course types, and publish with version tracking.

**Figure 9. Dynamic Application Creation Flow**



#### Key Features:

- Drag-and-drop field selection
- Predefined validation templates for key documents (e.g., bonds, IDs, background checks)
- Conditional logic rules for routing and eligibility
- Integrated course/certificate mapping

#### Operational Impact:

- **Empowers BSD teams** to rapidly deploy new or revised application flows
- **Improves agility** when responding to regulatory changes or policy updates
- **Reduces IT dependency**, enabling non-technical staff to manage workflows
- **Ensures uniform application quality**, minimizing incomplete or non-compliant submissions
- **Improves transparency and auditability**, with full version tracking and activity logs



Together, these staff-facing capabilities significantly reduce manual overhead, increase the quality and consistency of outputs, and enable BSD to serve notaries more efficiently—while meeting statutory and operational requirements with ease.

### 3.7 Advanced Data Analytics Integration via Refactored Data Lake

As part of the platform modernization, Venturit proposes **refactoring the existing Wizdn analytics database into a unified, cloud-native data lake architecture**. This transformation enables powerful, real-time analytics for operations, policy, and regulatory oversight by consolidating structured and semi-structured data from multiple services—without requiring manual data stitching or latency-prone batch exports.

#### Technical Rationale: Why a Data Lake?

Traditional analytics databases are optimized for historical reporting on static datasets. However, credentialing systems like BSD generate diverse, high-velocity data—from application events, course progress, CE compliance, AI validation results, to support workflows. A centralized data lake:

- **Ingests multi-source data at scale** (structured, unstructured, streaming)
- **Separates storage from compute**, allowing flexible scaling for queries and insights
- **Supports schema evolution**, which is critical as new programs or requirements emerge
- **Enables real-time dashboards** with low-latency query performance

#### Architecture & Technology Stack

- **Google Cloud CDC (Change Data Capture):**  
Seamlessly streams updates from operational services (e.g., Application, Course, Quiz, Certificate microservices) into the data lake without performance disruption.

- **BigQuery:**

Acts as the analytics engine on top of the lake, enabling fast, SQL-like queries across petabyte-scale datasets. Supports BI tools, ML models, and policy dashboards.

- **Cloud Storage + Data Catalog (optional):**

Provides scalable object-level storage and metadata management for semi-structured artifacts (e.g., PDF certificates, logs, scanned documents).

## Key Use Cases & Outcomes

Use Case	Outcome
Executive Dashboards	Real-time visibility into license throughput, exam pass rates, CE compliance
Compliance Monitoring	Detects anomalies in credential processing, late renewals, or eligibility flags
Policy Impact Analysis	Tracks how rule changes (e.g., new CE deadlines) affect applicant behavior
Support Ops Intelligence	Identifies bottlenecks, peak traffic, and response delays across teams
Legislative Reporting	Rapid generation of defensible, audit-grade reports for legal and statutory bodies

## Strategic Value

- **Breaks down data silos** across microservices and modules
- **Accelerates decision-making** across legal, administrative, and executive roles
- **Supports predictive analytics** for program forecasting and applicant lifecycle modeling
- **Reduces time-to-insight** from weeks to minutes
- **Future-proofs the platform** for AI model training, data sharing, and advanced compliance scenarios

This upgrade is not just a technical enhancement—it's a strategic shift from reactive reporting to proactive intelligence, transforming BSD into a data-driven credentialing authority.

## 4. Software Product Development Process

Venturit applies a modern, agile software engineering methodology optimized for public sector transformation. By combining **user-centered design**, **cloud-native microservices architecture**, and continuous delivery pipelines, we ensure that the BSD Learning and Credentialing System evolves iteratively—guided by stakeholder feedback, regulatory alignment, and measurable outcomes.

### Stage 1: Discovery & Design

#### 1. Stakeholder Engagement

- **Collaborative workshops** with credentialing authorities, legal experts, BSD administrators, notaries, and technical leads ensure all regulatory, operational, and learner perspectives are captured.
- **Accessibility & compliance reviews** are conducted early with WCAG and Section 508 consultants to integrate inclusive design strategies and mitigate risk.

#### 2. User-Centric Product Design

- **Learner personas** (e.g., new applicants, CE-compliant notaries, RON track candidates) are developed to inform workflow mapping and adaptive interface design.
- **High-fidelity interactive prototypes** include scenario-based navigation, mobile-first layouts, and embedded multimedia to simulate course experiences before code is written.

#### 3. Scalable, Modular Architecture

- The system is designed as a **cloud-native microservices architecture**, where each functional domain (e.g., applications, courses, certificates, notifications) is deployed

independently via containerized services using **Cloud Run and Docker on Google Cloud Platform**.

- Core services communicate via secured APIs, allowing **flexible integration** with existing state systems (e.g., Access Indiana, criminal record validation, and license registries).
- **Elastic scaling and fault tolerance** ensure the platform handles surges in user demand (e.g., renewal periods) without downtime.

## **Stage 2: Iterative Development & Validation**

- **Agile sprint cycles** (2–3 weeks) ensure continuous delivery of working features with stakeholder feedback incorporated in real time.
- Early versions of modules—such as the Applicant Portal or Learner Hub—are released for **pilot testing with selected end users**, including instructors and credentialing reviewers.
- **Automated and manual QA**, including security audits, accessibility testing, cross-browser validation, and **load testing at scale**, guarantees production readiness.
- Continuous integration pipelines validate builds and enforce **code quality, unit testing, and regression safeguards**.

## **Stage 3: Phased Deployment & Continuous Improvement**

- **Phased rollout strategy** minimizes disruption while allowing phased onboarding of staff, pilot users, and live applicants.
- Administrative and instructor teams receive **hands-on training modules, sandbox environments, and digital onboarding guides** tailored to their workflows.
- Post-deployment, **real-time analytics via BigQuery and the Wizdn Data Lake** track user behavior, engagement levels, and bottlenecks—providing data-driven direction for enhancements.
- Quarterly release cycles deliver **feature updates, security patches, and UI improvements** informed by structured feedback loops and support desk metrics.



## Why This Matters

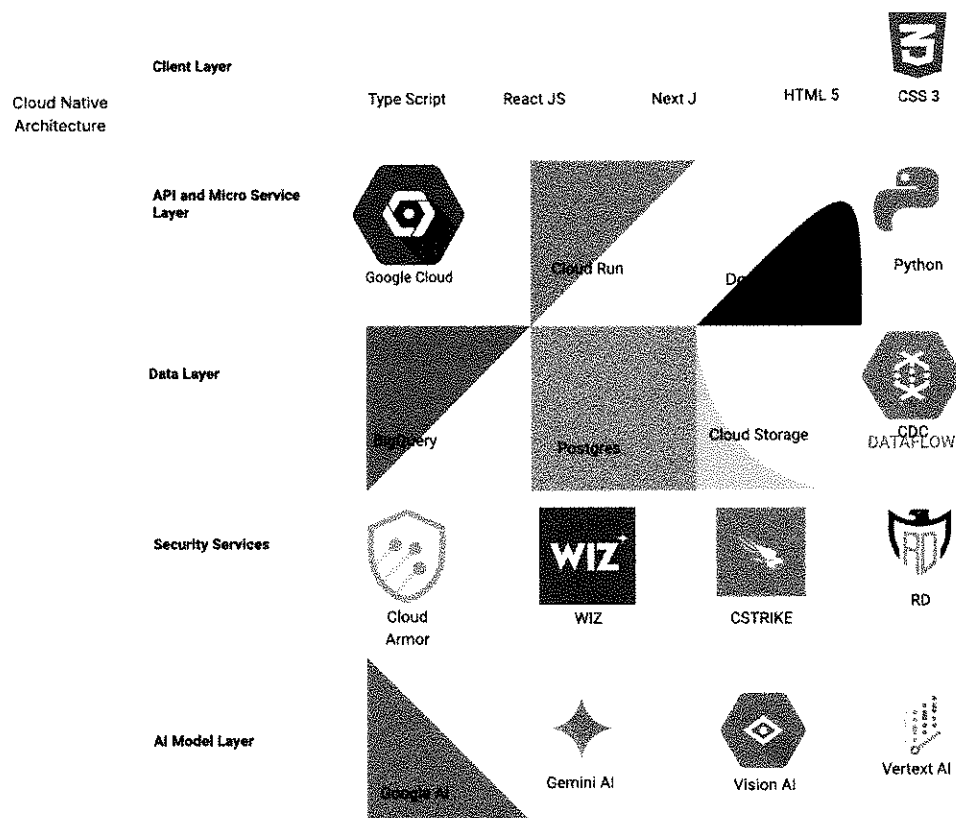
This product development approach ensures:

- Alignment with **State of Indiana cloud mandates and security requirements**
- Maximum **interoperability** with evolving credentialing needs
- Low-latency rollout of features that directly **enhance staff efficiency and user satisfaction**
- A continuously evolving platform that adapts to **policy changes, emerging technologies, and user expectations**

## 5. Software Architecture

The BSD Credentialing Platform is built on the **Wizdn Cloud-Native Framework**, as illustrated in **Figure 2**, leveraging a microservices-first, serverless architecture designed for scalability, modularity, and high availability. Each service is independently deployable, API-connected, and aligned with zero-trust security principles—ensuring a modern, maintainable infrastructure that evolves with Indiana's credentialing needs.

**Figure 2. Cloud-Native Architecture of INBiz Wizdn Framework**  
*(Previously shown—reference here for continuity and system overview)*



## Technology Stack Breakdown

Layer	Technology	Justification
<b>Frontend</b>	<b>ReactJS PWA</b>	Delivers a responsive, installable, mobile-first experience with offline capabilities—critical for broad accessibility.
<b>Backend API</b>	<b>FastAPI (Python)</b> microservices on <b>Cloud Run</b>	Asynchronous, lightweight services supporting high throughput and quick deployment; serverless for elasticity.
<b>Database</b>	<b>PostgreSQL</b> (isolated per microservice)	Ensures ACID compliance, scalability, and data isolation per domain (application, course, certificate, etc.).
<b>File Storage</b>	<b>Google Cloud Storage</b>	Durable, secure object storage for user uploads, certificates, and learning materials.
<b>AI Engine</b>	<b>Vertex Vision AI + Gemini AI</b>	Validates documents, enhances workflows, and supports dynamic learning recommendations through contextual intelligence.
<b>Analytics Layer</b>	<b>Google CDC → BigQuery</b>	Provides real-time data feeds from microservices to support compliance auditing, reporting, and executive dashboards.
<b>Hosting</b>	<b>Google Cloud Run (Serverless Containers)</b>	Auto-scaled container deployment with minimal ops overhead and integrated monitoring/logging via Google Cloud services.

## Security Model

Security is enforced through a **multi-layered zero-trust model**, integrated natively into the architecture and supported by enterprise-grade tooling, including:

- **Perimeter & Infrastructure Protection:**
  - **Google Cloud Armor** filters DDoS and protocol-based threats at the edge
  - **WIZ** performs deep configuration posture assessments and misconfiguration alerts

- **CSTRIKE** provides real-time vulnerability scanning and security scoring of active containers and microservices
- **Request-Level Threat Detection and Mitigation:**
  - **Rootkit Defense (RD)** scans API request patterns and payloads in real time
  - Suspicious behavior (e.g., injection attempts, rate anomalies) is intercepted at runtime
  - AI-driven detection models flag and adapt to new exploit types automatically
  - 24/7 monitoring and real-time threat mitigation.
- **Access Control & Identity:**
  - Role-Based Access Control (RBAC) for admins, learners, reviewers
  - IAM policies and Cloud Identity support scoped permissions with audit logs
  - OAuth 2.0 and Access Indiana federated SSO integration for authentication
- **Data Protection:**
  - All PII, CE records, and uploaded documents are encrypted in transit (TLS 1.3) and at rest (AES-256)
  - File-level access tokens and signed URLs restrict document visibility based on role

## Architecture Alignment with Strategic Goals

This architecture delivers:

- **Scalability:** Handles peak seasonal volumes for CE, renewals, and exam surges without downtime
- **Modularity:** Each service is independently upgradeable, allowing for incremental program expansions
- **Compliance:** Fully aligned with **75 IAC**, state cloud mandates, and security benchmarks
- **Future-Proofing:** Easily extensible for additional credential types, data integrations, and AI-driven use cases

This architecture is not only cloud-native—it's **purpose-built for credentialing modernization**, offering unmatched flexibility, resilience, and control for the Indiana Secretary of State's evolving needs.



## 6. Project Management & Team Structure

Venturit applies an agile, iterative project management model to ensure flexibility, accountability, and continuous improvement. Our multidisciplinary team brings deep expertise across **software engineering, instructional design, accessibility, and cloud-native DevOps**, ensuring successful delivery of a scalable, user-centric LMS aligned with Indiana Secretary of State goals.

All project activities will be tracked using **Microsoft Azure DevOps (ADO)**, supporting real-time collaboration, sprint planning, and end-to-end traceability for user stories, features, and tasks.

### Proposed Core Team

Role	Responsibilities
Chief Software Architect [1]	Designs and governs the microservices architecture, ensuring scalability, modularity, and system integration.
Instructional Designer [1]	Develops course structures, aligns with adult learning theory, and ensures accessibility (e.g., WCAG compliance).
Internal Project Manager [1]	Oversees timelines, resources, communication, and stakeholder alignment.
Engineering Manager [1]	Leads engineering execution, ensures modern practices, performance, and cybersecurity.
DevOps Engineer [1]	Builds CI/CD pipelines, automates cloud deployments, ensures uptime and secure infrastructure.
Back-End Developers [2]	Implement secure APIs, data models, and AI-driven services for credential management and personalization.
Front-End Developers [2]	Build responsive, accessible ReactJS interfaces optimized for mobile and cross-browser use.

QA Engineers [2]	Run manual and automated test cycles, validate accessibility, content flow, and UX integrity.
UX/Product Designer [1]	Crafts intuitive, persona-driven interfaces and ensures alignment with learning workflows.
3D Designer [1]	Develops simulations and modular 3D content to enhance engagement and retention in CE modules.

### Team Value Proposition

This team is uniquely positioned to deliver a world-class learning and credentialing platform that:

- **Incorporates instructional best practices** using ADDIE, Bloom’s Taxonomy, and immersive learning design
- **Leverages microservices and cloud-native infrastructure** to support future expansion and maintainability
- **Delivers measurable user satisfaction** through accessible, personalized learning experiences

The combination of technical rigor and instructional excellence ensures BSD will receive a platform that is both operationally efficient and learner-centered—built for today’s needs and tomorrow’s growth.

## 7. Project Timeline – Estimated Duration: 5–6 Months

Venturit proposes a four-phase development approach designed to deliver value rapidly while ensuring enterprise-level quality, security, and regulatory alignment. A fifth (optional) phase is available for post-launch optimization and planning for future credentialing programs.

### Phase I: Discovery, Planning & Prototyping

**Duration:** Month 1

**Key Activities:**

- Stakeholder workshops (SOS, IPLA, admin staff, accessibility experts)
- Requirements gathering for Notary, RON, and CE tracks
- Learner persona development & UI/UX prototyping
- Microservices boundary definition and architecture planning
- AI model design for document validation (Vertex Vision AI, Gemini)
- Security model design (Cloud Armor, WIZ, CSTRIKE, Rootkit Defense)

### Phase II: Core Development & Integration

**Duration:** Months 2–3

**Key Activities:**

- Applicant Portal, Learner Hub, Admin Central microservice builds
- Certificate and CE service integration
- Dynamic form builder and auto-enrollment development
- API integrations with Access Indiana, Surety verification, background checks
- Data Lake & analytics setup (Google CDC → BigQuery)

- CI/CD pipelines using Cloud Build and GitHub Actions

### **Phase III: Quality Assurance & Security Validation**

**Duration:** Month 4

**Key Activities:**

- Functional testing (manual and automated)
- Usability and accessibility testing (WCAG, mobile)
- Performance and load testing (peak periods, high concurrency)
- Threat modeling and security validation
- UAT with notary users, staff, and instructors
- Content review and compliance validation

### **Phase IV: Deployment, Training & Go-Live Support**

**Duration:** Month 5

**Key Activities:**

- Phased rollout with rollback and monitoring safeguards
- Administrator and instructor onboarding
- Finalization of support documentation and user training
- Post-launch support workflows
- Live analytics dashboards for usage, CE compliance, and error tracking

## **Phase V (Optional): Optimization & Strategic Expansion**

**Duration:** Month 6

### **Key Activities:**

- CE workflow and notification optimization
- Post-launch stakeholder reviews
- RON audit readiness automation
- Planning for next-phase credentialing programs

### **Why This Timeline Works**

- Aligns with **agile delivery** and continuous feedback
- Modular, **microservices-based development enables parallel workflows**
- Embeds **compliance and security testing in every phase**
- Ensures **early value delivery** while preparing for long-term scalability

## 8. Budget Overview

Venturit proposes the following budget for the Indiana Notary Credentialing LMS, structured to reflect secure, scalable, and modular delivery aligned with state technology and procurement standards. All costs include architectural security, automation, and regulatory compliance capabilities.

### Fixed Project Development Costs

Item	Estimated Cost
<b>All features described under Sections 2 and 3 – developed using Zero Trust-Driven Architecture: Applicant Portal, Enhanced Business Workflows, and LMS Core Enhancements</b>	<b>\$180,000</b>
<b>Digital Secure Credential Certificate Lifecycle Automation</b>	<b>\$75,000</b>
<b>AI Agent Design (Document &amp; Identity Validation)</b>	<b>\$50,000</b>
<b>Cloud Infrastructure Setup (Cloud Run, CI/CD, IAM, Storage)</b>	<b>\$30,000</b>
<b>Data Lake &amp; BigQuery Analytics Stack</b>	<b>\$25,000</b>
<b>Total Fixed Project Cost (Before Discount)</b>	<b>\$360,000</b>
<b>5% Cost Concession (State Mandate)</b>	<b>-\$18,000</b>
<b>Total Fixed Project Cost (After Discount)</b>	<b>\$342,000</b>



**Monthly Billing Schedule (Fixed Project Phase)**

Billing Milestone	Timing	Amount
Initial Payment – 25% at Contract Start	Month 0	\$85,500
<b>Phase I Completion – Discovery &amp; Prototyping</b>	End of Month 1	\$72,000
<b>Phase II Midpoint – Core System Buildout</b>	End of Month 2	\$72,000
<b>Phase III Completion – QA, UAT, Threat Modeling</b>	End of Month 4	\$56,250
<b>Phase IV Completion – Go-Live &amp; Training</b>	End of Month 5	\$56,250
Total Fixed Project Cost (After Discount)		<b>\$342,000</b>

All payments reflect the revised scope and include the 5% State-mandated cost concession.

**Ongoing Maintenance and Support Services**

Support Services	Monthly	Annualized
Monitoring, DevOps, Technical Helpdesk, AI Tuning, GCP	\$15,000	<del>\$90,000</del> <sup>ie</sup>
Infrastructure Management, Minor Enhancements & Upgrades	(6 months)	

**Note:** This revised monthly support cost **supersedes and includes the currently approved INBIZ LMS monthly support rate of \$8,000/month**. The updated amount reflects a broader support scope covering cloud infrastructure management, real-time monitoring, technical helpdesk services, AI model tuning, and minor upgrade cycles to keep the system responsive to policy changes and user needs.

Not to exceed total \$132,000 <sup>08</sup>

## **Appendix**

### **From the Desk of the CEO**

Venturit is honored to serve the Indiana Secretary of State and contribute to the State of Indiana's continued leadership in innovation, security, and public service. We bring to this engagement the highest standards of software engineering and a deep commitment to building solutions that matter.

As a Doctor of Technology graduate from Purdue University, I take great pride in developing educational platforms that improve lives—by making learning more accessible, credentials more secure, and systems more efficient. This project represents more than just technology; it is an opportunity to create a lasting impact on how the State of Indiana empowers, certifies, and supports its notaries.

It is a privilege to partner with you in building a best-in-class learning and credentialing system—designed with purpose, powered by AI, and built for the future.

**Boiler Up!**

**Dr. Prabode Weebadde**

Founder & CEO

Venturit Inc.

# Change Control Management

Effective change control is essential for maintaining the integrity of scope, budget, and timeline throughout the project lifecycle. Venturit follows a **structured change control process** that ensures any requested modifications are fully documented, thoroughly evaluated, and transparently implemented with appropriate approvals and stakeholder visibility.

## 1. Change Control Process

### 1. Change Request Submission

- **Who Can Submit:** Any project stakeholder or team member
- **Submission Method:** A change control request form submitted through **Azure DevOps (ADO)**
- **Required Information:**
  - Description of the proposed change
  - Reason or justification
  - Expected impact (scope, schedule, budget)

### 2. Request Evaluation

- **Activities:** Reviewed by the project manager and relevant SMEs
- **Evaluation Criteria:**
  - Alignment with project objectives
  - Impact on deliverables, resources, or timeline
  - Technical feasibility and risk

### 3. Impact Analysis

- **Activities:**

- Detailed analysis of change implications on cost, timeline, staffing, and dependencies
- **Deliverable:**
  - **Impact Analysis Report** outlining findings, risks, and recommended actions

#### **4. Approval Process**

- **Presentation:** Submitted to the **project steering committee or designated approver(s)**
- **Decision Options:**
  - Approved
  - Rejected
  - Deferred (pending further analysis or conditions)

#### **5. Implementation Planning**

- **Activities:**
  - Develop a change implementation plan
  - Update project schedule, documentation, and resource allocations
- **Responsibility:** Project manager coordinates with engineering, instructional design, or infrastructure teams as needed

#### **6. Change Implementation**

- **Execution:** Carried out as per the approved plan
- **Monitoring:** Tracked for performance and compliance by the project manager
- **Documentation:** Changes logged and reflected in updated project artifacts

#### **7. Post-Implementation Review**

- **Activities:**
  - Stakeholder feedback gathered
  - Evaluation of actual vs. expected impact

- **Deliverable:**
  - **Post-Implementation Review Report**, documenting effectiveness, lessons learned, and any follow-up actions

**2. Benefits of Structured Change Control**

- **Controlled Change Execution:** Avoids scope creep and ensures alignment with project goals
- **Transparency and Accountability:** Maintains a clear audit trail of all requests and decisions
- **Risk Mitigation:** Proactively identifies and addresses potential downstream issues
- **Stakeholder Alignment:** Ensures everyone is informed and involved in meaningful change decisions

**3. Sample Change Control Form Fields**

Field	Description
Change Request ID	Unique identifier
Date of Submission	Date request was entered
Submitted By	Name of requester
Description of Change	Summary of requested modification
Reason for Change	Business or technical justification
Impact Analysis Summary	Key findings and risk assessment
Approval Status	Approved / Rejected / Deferred
Implementation Plan Summary	Overview of execution approach
Post-Implementation Review Notes	Outcomes, stakeholder feedback, lessons

By adhering to this disciplined change control framework, Venturit ensures that any deviation from the approved plan is **managed transparently, implemented responsibly, and aligned with the strategic goals** of the Indiana Secretary of State.



# Terms and Conditions

## 1. **Scope of Work**

Venturit Inc. will deliver the services outlined in this proposal. Any modifications or additions to the agreed-upon scope will require a separate written agreement and may result in additional charges.

## 2. **Payment Terms**

Payments will be based on the milestone billing schedule detailed in the proposal. All fees are billed on a time-and-materials basis. The State of Indiana agrees to a minimum three-year commitment for annual support and maintenance fees.

## 3. **Confidentiality**

Both parties agree to treat all project-related information as confidential. No such information shall be disclosed to any third party without prior written consent, unless required by law.

## 4. **Licensing and Platform Rights**

Venturit Inc. retains full ownership and rights to its proprietary Wizdn platform and supporting technologies. The State of Indiana will be granted a **perpetual, royalty-free license** to use, access, and maintain the delivered software and related source code specifically for its internal use.

This clause supersedes any previous intellectual property terms or agreements.

## 5. **Termination**

Either party may terminate this agreement with 30 days' written notice. Upon termination, the State of Indiana shall compensate Venturit Inc. for all work completed and documented up to the effective termination date.

## 6. **Warranty**

Venturit Inc. warrants that all deliverables will be developed in a professional and workmanlike manner and will conform to agreed specifications. Any material defects identified within 90 days of final delivery will be resolved at no additional cost.

## 7. **Limitation of Liability**

Venturit Inc. shall not be liable for indirect, incidental, or consequential damages arising

from use or inability to use the software. Total liability under this agreement shall not exceed the total amount paid to Venturit Inc. for the services rendered under this engagement.

**8. Dispute Resolution**

In the event of a dispute, both parties will first attempt resolution through mediation. If mediation is unsuccessful, the matter will proceed to binding arbitration under the rules of the American Arbitration Association.

**9. Governing Law**

This agreement shall be governed by and construed in accordance with the laws of the State of Indiana, without regard to conflict of law provisions.

**10. Amendments**

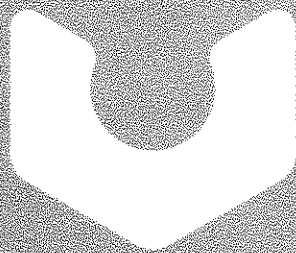
Any changes to this agreement must be made in writing and signed by both parties.

## Why Venturit?

Venturit is a trusted innovation partner to public and private sector institutions seeking to modernize how people learn, interact, and access services. With deep expertise in AI, cloud-native platforms, and enterprise software architecture, we specialize in building secure, scalable solutions that are user-centric and future-ready. As a U.S.-based company with global delivery capabilities, our team blends engineering excellence with human-centered design to create products that solve real-world problems—efficiently and elegantly.

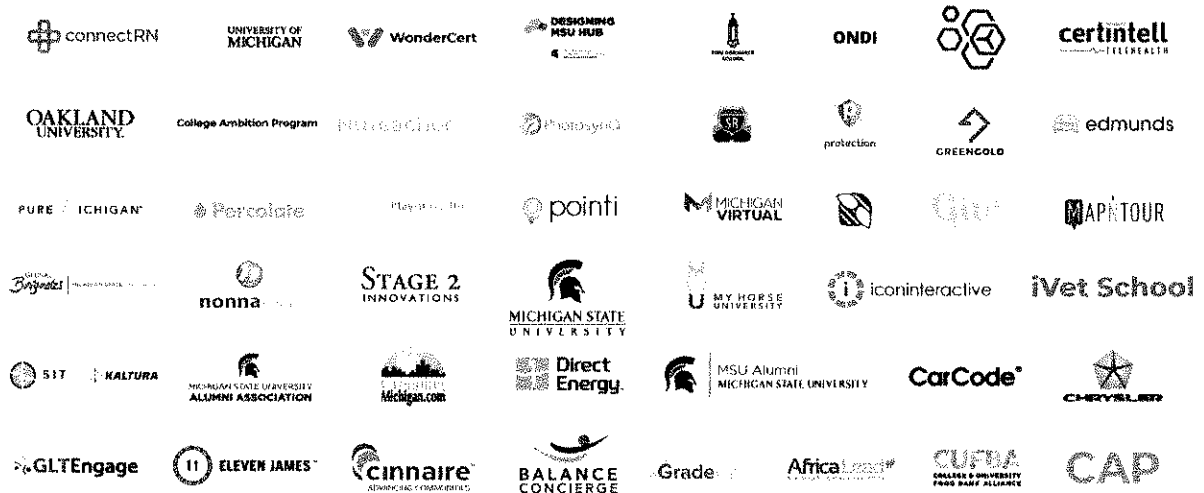
We've delivered mission-critical platforms across industries including government, education, and healthcare—each designed to simplify complexity, improve access, and ensure compliance. Our work with credentialing systems, state governments, and regulatory platforms demonstrates a proven ability to build secure learning and licensing ecosystems at scale. We do more than deliver software—we partner closely with stakeholders to shape outcomes that endure.

Venturit is proud to bring that same commitment to excellence to the State of Indiana through the Wizdn platform—empowering notaries with intelligent tools, reducing staff burden through automation, and building a foundation that supports the next generation of credentialing services.



[www.venturit.com](http://www.venturit.com)

## Clients Over the Years



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# Client's Projects

## and Strategies











## Manage Reviews

All

100 items




Search

 Analytics Credentials Reviews Reviewers Applications Ringsheets Payment History Categories Roles Users Organization Details FAQ

911






## Leadership Mission and Vision

 Johanna Drake  MEMSPA  January 10, 2019[View Details](#)

699






## Leadership Mission and Vision

 Johanna Drake  MEMSPA  January 10, 2019[View Details](#)

980






## Leadership Mission and Vision

 Johanna Drake  MEMSPA  January 10, 2019[View Details](#)

115






## Leadership Mission and Vision

 Johanna Drake  MEMSPA  January 10, 2019[View Details](#)

106






## Leadership Mission and Vision

 Johanna Drake  MEMSPA  January 10, 2019[View Details](#)

583




## Leadership Mission and Vision

 Johanna Drake  MEMSPA  January 10, 2019[View Details](#)

732






## Leadership Mission and Vision

 Johanna Drake  MEMSPA  January 10, 2019[View Details](#)

901






## Leadership Mission and Vision

 Johanna Drake  MEMSPA  January 10, 2019[View Details](#)

527






## Leadership Mission and Vision

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491



## Leadership Mission and Vision

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[Home](#)[Browse Credentials](#)[My Submissions](#)[My Credentials](#)[Billing History](#)[Settings](#)[FAQ](#)

## My Credentials

Search



## Leadership Mission and Vision

MEMSPA | January 14, 2019 | Experience January 14, 2019

Leverage agile frameworks to provide a robust synopsis for high level overviews. Iterative approaches to corporate strategy foster collaborative thinking to further the overall value proposition. Organically grow the holistic world view of disruptive innovation via workplace.

Interaction

User-experience

Design Patterns

Share on:

<https://won.cert/2EfZuKV> or [f](#) [in](#) [@](#)

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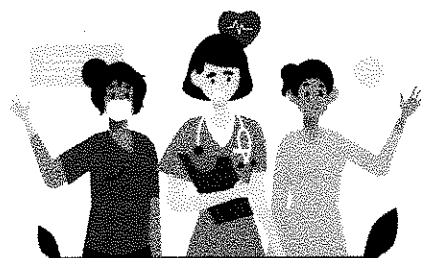
Share on:

<https://won.cert/2EfZuKV> or [f](#) [in](#) [@](#)

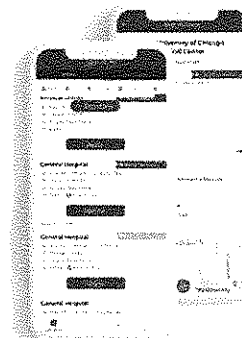


#### About Us

**We're a growing community of nurses, nursing aides, and assistants**



Revenue  
\$100M+

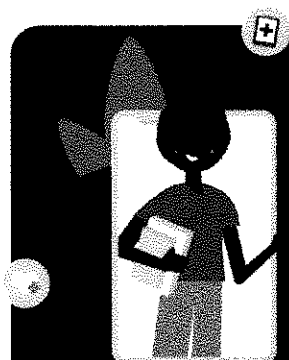


#### Our Story

## We're built to support nurses!

connectRN is the provider of the nurse-centric staffing app that reinvents the way nurses and other clinicians find per-diem work. Using technology, we connect our community of clinicians by surfacing shifts matched to individual preferences. Healthcare facilities use connectRN to connect with our clinician network and fill their staffing needs!

We're much more than an app. We're a global company that's revolutionizing the way nurses find work!



Global LT offers world-class language training solutions for your teams.

GLTEngage

venturit.

< ☰

☰

✓ Your session review has been submitted successfully.

✕

Wednesday, January 26

Welcome back Mike!

- 1 You have 5 pending sessions to approve
- 2 You have a session starting in 10 minutes with John Doe
- 3 You got a new message from Talent Jane Adams



Get More Assignments

Grammar Practice

Date Assigned:

12/08/2020

Talent: Brian Brady

[View Session Assignments](#)

Pending Sessions to Review

Delivery Method:	Face to Face	
Session Date	Time	Duration
10/30/2020	08:38AM	1h 30m
<a href="#">Continue Now</a>		<a href="#">Review or Reject</a>

Delivery Method:	Virtual	
Session Date	Time	Duration
02/11/2020	10:00AM	2h
<a href="#">Continue Now</a>		<a href="#">Review or Reject</a>

[View all pending sessions](#)

My Upcoming Assignments and Meetings

View: All

Assessment

Home of Test Frequency

12

March 2020

[Start Test >](#)

Assessment

New Ideas for a Low Cost Vacation

15

March 2020

[Continue >](#)

Assessment

New Ideas for a Low Cost Vacation

16

11:50 AM (EST)

[Continue >](#)

Assessment

Assignments Sessions

18

March 2020

[Continue >](#)

[View all](#)

MY PROGRESS

ASSIGNMENTS

EVENT

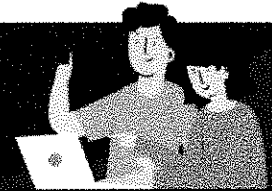
KNOWLEDGE BASE

Wednesday, January 26

 Rosetta Stone

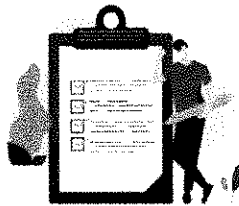
Welcome back Mike!

- 1 You have one assessments ready pending to finish
- 2 You have been working on Rosetta Stone for 10 Hours and 25 Minutes



## My Assessments

Graded Assessments


Name of Test  
Frequency

30%

Status



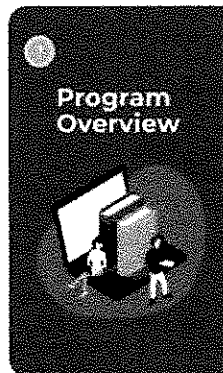

Continue Test &gt;

English


Completion  
65%Completion Date (MM/DD/YYYY)  
06/12/2020 Certificate >

Download Report

## My Stats

  
Desktop Time12  
Hours  
Test Time21  
Hours  
Tutoring  
Session Time21  
Hours  
Mobile Time8  
Hours  
Completed  
Tutorings10  
Hours  
All Products72  
HoursAssessments  
100 Total Qty60%  
Completed Completed  
Qty  
86Available  
Qty  
14Rosetta Stone  
165 Total Used Hours165  
Hours Cloud  
Builder

76

 Foundation

89

## Language Events



Join the Celebration!

Wednesday, July 22  
8:00PM (EDT) - 9:00 PM (EDT)

Join the Celebration! Join the Celebration!

<≡

Dashboard

Calendar

Sessions

Class History

**Family Members**

ASSIGNMENTS

SUPPORT

PROFILE

NOTIFICATIONS

DASHBOARD

CALENDAR

SESSIONS

CLASS HISTORY

**FAMILY MEMBERS**



Harry Edwards



Gerrard Edwards



Bella Edwards



Julia Edwards



Teresa Edwards

Start Date

March, 12, 2019

Completion Deadline

May, 21, 2019

Next Class

April, 22, 2019



Total Units

120

Completed Units

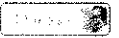
90

Available Units

30

Session Record

Session Number	Date	Start Time	Duration	Delivery Method	Global Evaluation
102938	04/18/2019	11:30 AM	2 Hours	Face To Face	
102938	04/09/2019	7:00 AM	2 Hours	Face To Face	
102472	04/02/2019	6:00 PM	1 Hour	Face To Face	
120476	04/01/2019	11:00 AM	2 Hours	Face To Face	
123762	03/29/2019	8:30 AM	2 Hours	Face To Face	
102476	03/16/2019	12:00 PM	1 Hour	Face To Face	
102846	03/07/2019	7:00 PM	1 Hour	Face To Face	
102462	02/20/2019	8:30 PM	1 Hour	Face To Face	
123962	02/06/2019	12:00 PM	2 Hours	Face To Face	



Dashboard

Assignments

Events &amp;

Knowledge

## DASHBOARD

Launch Rosetta Stone

## Upcoming Sessions

View all →

Virtual	Allen Yates	10/10/2020	09:40AM (EST)	<a href="#">Join</a>
Face-to-Face	Eugenia Mendez	02/15/2020	09:30AM (EST)	<a href="#">Details</a>
Virtual	Allen Yates	03/04/2020	03:41PM (EST)	<a href="#">Details</a>
Virtual	Allen Yates	11/09/2020	02:35AM (EST)	<a href="#">Details</a>
Virtual	Allen Yates	11/09/2020	02:35AM (EST)	<a href="#">Details</a>

## ★ Language Experiences



## Review Sessions

View all →

Delivery Method: Face to Face

Session Date	Time	Duration
10/30/2020	08:38AM	1h 30m

[Confirm Now](#)[Review or Edit](#)

Delivery Method: Face to Face

Session Date	Time	Duration
10/30/2020	08:38AM	1h 30m

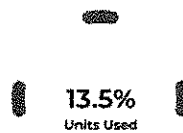
[Confirm Now](#)[Review or Edit](#)

Delivery Method: Face to Face

Session Date	Time	Duration
10/30/2020	08:38AM	1h 30m

[Confirm Now](#)[Review or Edit](#)

## Program Information

Completion Deadline  
01/07/2020Approved Units  
100Completed Units  
19.5Remaining Units  
80.5

## Assignments

View all →

## Printers

Complete by: 12/08/2020  
Choosing The Best Photo Printer[Start](#)

## Lessons

Complete by: 12/08/2020  
The Skinny On Lcd Monitors[In Progress](#)

## Surveys

Complete by: 12/08/2020  
Windows Registry Cleaner Checklist[In Progress](#)

## Lessons

Complete by: Choosing The Best

[In Progress](#)





- ×
- Home
- Share
- Connect
- Connections
- Groups
- Events
- Grow
- Thank an educator
- Center for T&L
- Mediaspace
- MSU Commons
- Getting Started
- Help

## Browse

ALL GROUPS CATEGORIES PEOPLE PLAYLISTS ASSESSMENTS ARTICLES



### Microfinance: Front Pocket Economy



43 Members

VIEW



### Frontline Pocket Studies



256 Members

JOIN



### Front Unity Network



114 Members

JOIN



### Front Porch Community



114 Members

JOIN



### Frontline Responders Emergency Services



256 Members

VIEW

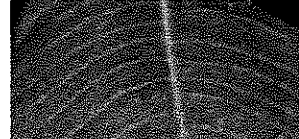


### Pocket of Friends



114 Members

VIEW



← Back

👍 120

📌 Assign

✎

🗑



## Learning Communities are Spaces to Explore Ideas

is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged

[+ view more](#)



Posted by: Amy Ortega 🌐  
Estimated time: 60 mins

### Playlist Sections

✓ Social Media and Communication

🔊 Facebook Listeners

Make an impression

What you can do

### 🔍 Key Words

TECHNOLOGY

EDUCATION

INTRODUCTION

INNOVATE

+3

### 🏷 Tags

LEARNING

EDUCATION

IDEAS

SOCIAL MEDIA

PLAYLIST

### Description

There is something about parenthood that gives us a sense of history and a deeply rooted desire to send on into the next generation the great things we have discovered about life. And part of that is the desire to in still in our children the love of science, of learning and particularly the love of nature.

✓ **How To Set Intentions That Energize You**

📄 **When You Are Down And Out How Do You Get Up And Go Forward**

📄 **The Power Of Notes**

📄 **Increasing Prosperity With Positive Thinking**

📄 **Burning Desire Golden Key Or Red Herring**

## Create New Patient

### Recommended Devices

According to the patient's condition, we recommend the following devices:



### All Available Devices

All Available Devices (10)



Nonnatech's patented solutions focus on patient safety, improving health outcomes and creating an exceptional patient care experience.

nonnatech

Enter Code



Grand Meadow Medical Center

1000 Grand Meadow Blvd, Suite 200, Grand Meadow, MN 56041

Search

### USRS

PHYSICIAN	PHONE	EMAIL	ACTION
Dr. J. Thompson	508-123-4567	thompson.j@grandmeadow.com	Profile Edit
Dr. A. Smith	508-234-5678	smith.a@grandmeadow.com	Profile Edit
Dr. B. Johnson	508-345-6789	johnson.b@grandmeadow.com	Profile Edit
Dr. C. Davis	508-456-7890	davis.c@grandmeadow.com	Profile Edit
Dr. D. Wilson	508-567-8901	wilson.d@grandmeadow.com	Profile Edit
Dr. E. Brown	508-678-9012	brown.e@grandmeadow.com	Profile Edit
Dr. F. Green	508-789-0123	green.f@grandmeadow.com	Profile Edit
Dr. G. White	508-890-1234	white.g@grandmeadow.com	Profile Edit
Dr. H. Black	508-901-2345	black.h@grandmeadow.com	Profile Edit
Dr. I. Grey	508-012-3456	grey.i@grandmeadow.com	Profile Edit

Load More



Great River School

*Eupatorium nortonii*

Select template from list

Activity Name	Type	Start Date	End Date	Assigned To	Status
Yearly Check-in	One-on-One	05/16/2021	05/16/2021	Hanny Marissa	ACTIVE
90 Day Evaluation	Roundup	01/16/2021	01/16/2021	Carlo Schults	ACTIVE
Employee Roundup	Roundup	11/14/2021	11/14/2021	Olav Watson	ACTIVE
Monthly Check-in	One-on-One	10/14/2021	10/14/2021	Lynn Paak	ACTIVE
New Employee Checklist	One-on-One	09/07/2021	09/07/2021	Lela Ferguson	ACTIVE
New Employee Kick-off	One-on-One	11/14/2021	11/14/2021	Sara Hilber	ACTIVE
One-on-One	One-on-One	07/13/2021	07/13/2021	Cecile Peier	ACTIVE

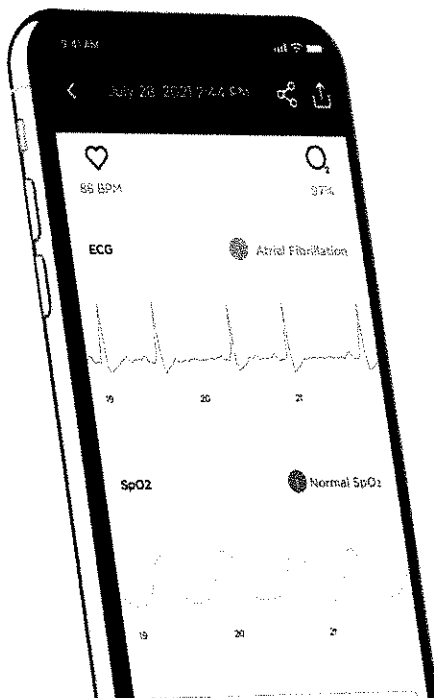
With KlickHR's ease of use, you can easily and effectively gather employee feedback, identify what's working well and what is not while capturing trends throughout the organization.

- Customize templates based on organization, department, and job code
- Track manager and employee feedback in real time
- Identify challenges, successes, and concerns within the organization
- Set and track employee goals to align with strategic objectives
- Generate custom reports and metrics to identify trends
- Ensure organizational culture goals are accomplished
- Integrate with your current performance management solution

**Simplify and modernize your  
HR talent management processes.**

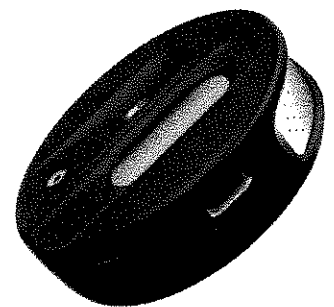
## Our Subsidiaries

# Avidhrt

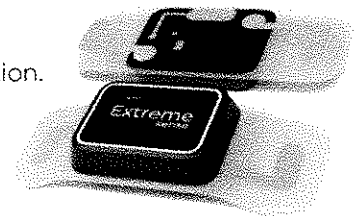


## Avidhrt Features

- Affordable and easy to use.
- Clinical grade multi-channel vital monitor.
- AI-driven ECG arrhythmia detection.
- Risk alerts.
- On-demand clinician reviews.
- AI powered cuffless BP - Hypertension detection.

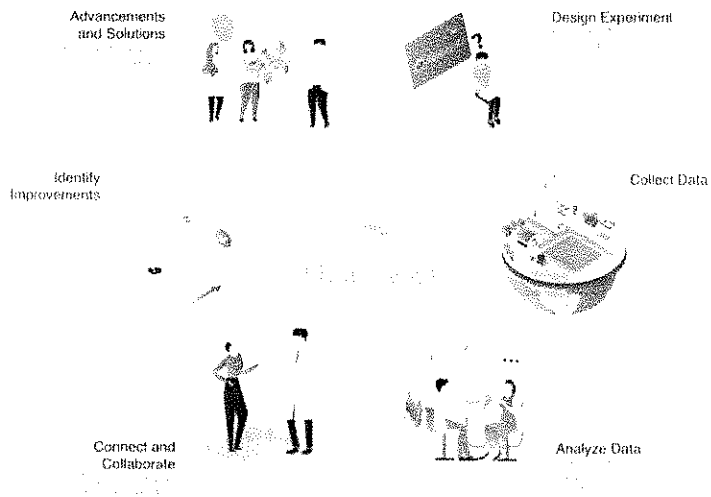


Avidhrt Sense  
Hand-held

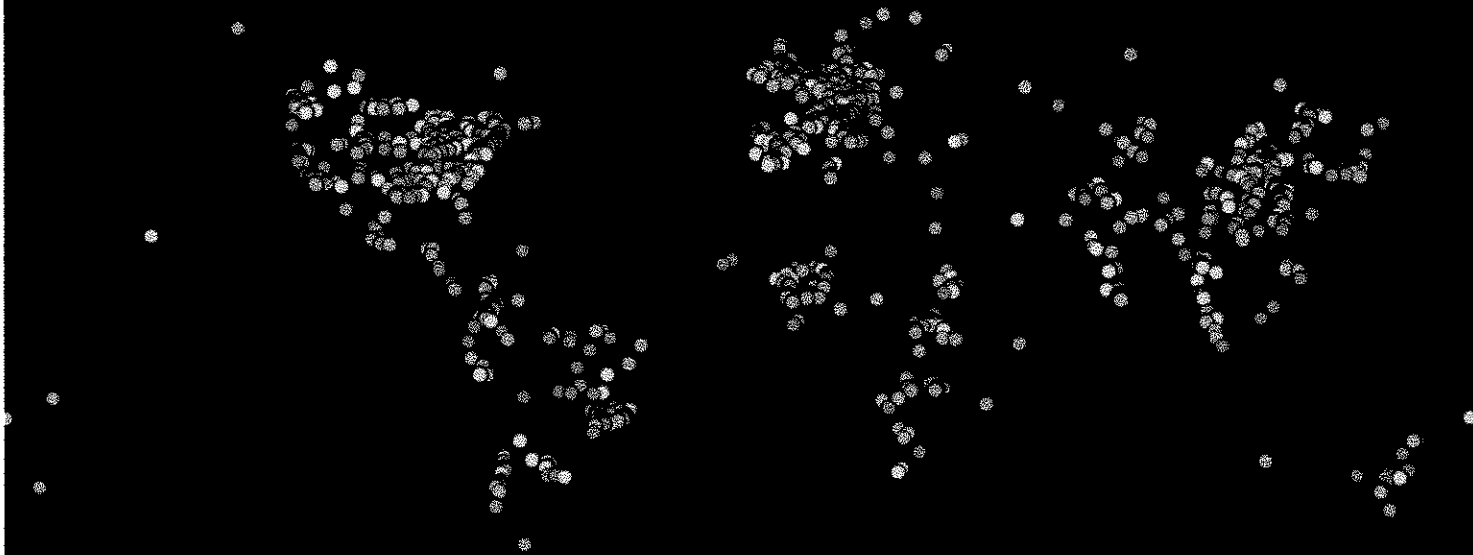


Avidhrt  
Extreme Patch

# The World-leading Plant Phenotyping Platform



PhotosynQ Global Customers



19.66 K Projects

9601 Users

4.41 M Contributions



# CarCode®

**49% of shoppers prefer text messaging!**

Acquired by:  
**edmunds**

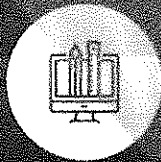




# Product Development Process

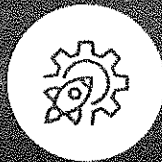
# Process Stages

Stage 1



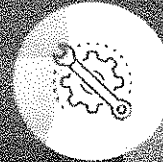
Design

Stage 2

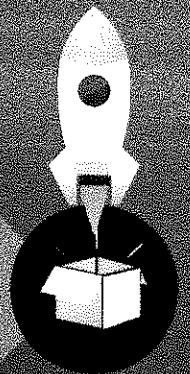


Develop

Stage 3



Maintain



# Design Stage

---

Applies for new applications or new features for an exciting application.

## Steps

- Step 1 Discovery Call
- Step 2 Technical Discovery
- Step 3 User Experience Design
- Step 4 User Interface Design
- Step 5 Clickable Prototype



Stage 1



Step 1

# Discovery Call

---



Stage 1

## Activities



Kickoff Meeting



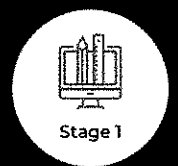
Market Analysis



User Personas

Step 2

# Technical Discovery



Research technology stack including researching reusable internal and external open source libraries, code review if current code is present, and creating a DevOps strategy for deployment and hosting.

## Activities



Cloud infrastructure servers, databases, and services recommendations



Testing and test coverage recommendations



Development tools, monitoring, and analytics tools recommendations



Technology stack for Web, Mobile, Desktop, etc.



Design software architecture using design patterns, such as MVC, to separate front-end, back-end, and business logic. Apply micro-services as needed.



## Deliverables

1. **Technical Discovery Document**

# UX Design



Step 4

# UI Design

---

Visual designs using user experience design deliverables.



Stage 1



**Style Concepts**



**Atomic Design or  
Material Design System**

Deliverables

1. **Design System  
with high-fidelity  
designs**





Step 5

# Clickable Prototype

---

Design System turned into a prototype using invision or figma .



Stage 1



Screen design and user flow mapping

Deliverables

1. **Figma Project and Prototype**



# e.g. Design Stage



## User Persona Example

**James** 30 years old  
Male  
Age 30

**Background:** James is a student at a university in the UK. He is a full-time student and is currently in his third year. He is a member of a student society and is involved in various activities. He is a member of a student society and is involved in various activities. He is a member of a student society and is involved in various activities.

**Goals:** James wants to improve his mental health and reduce his stress levels. He wants to be able to manage his time better and reduce his stress levels. He wants to be able to manage his time better and reduce his stress levels.

**Needs:** James needs a tool that can help him manage his time and reduce his stress levels. He needs a tool that can help him manage his time and reduce his stress levels. He needs a tool that can help him manage his time and reduce his stress levels.

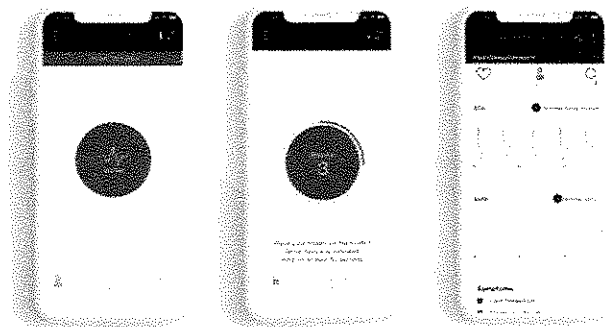
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**Needs:** James needs a tool that can help him manage his time and reduce his stress levels. He needs a tool that can help him manage his time and reduce his stress levels. He needs a tool that can help him manage his time and reduce his stress levels.

## Clickable Prototype Example



Step 6

# Stakeholders Meeting & Review

---



Stage 1

Ensure a comprehensive understanding and approval of all project aspects before initiating development.

## Activities



Reviewing the personas and stories



Reviewing the technical discovery document



Security threat analysis



Reviewing the design systems

Deliverables

1. High-level Sign-off document.



# Develop Stage

---

Our agile approach:

## Steps

- Step 1 Pre-development planning
- Step 2 Iterative development, testing, and UAT deployment
- Step 3 Product Launch



Step 1

# Pre-development Planning



Forming teams, milestones, stories, backlog, and sprint plan

## Activities



Frontend & Backend  
Teams assembly



Creating stories (assign as  
tasks for developers and  
QA in sprint planning)



Planning sprints



Building project roadmap  
and milestones



Grooming stories

## Deliverables

1. Jira project with a roadmap, sprint plan and threat mitigation model deliverables

Step 2

# Iterative development, testing, and UAT deployment

---



## Activities



Two weeks sprint, unit or behavior test-driven coding, linting, code review and quality assurance, and continuous integration



Sprint retrospective



Version releases



Launch to staging for UAT and beta testers

## Deliverables



1. Source code with release versions
2. Automated and Manual test coverage, functional, regression, and load testing

Step 3

# Product Launch

---



## Activities



Client acceptance



Production release on  
App Store and Play Store  
(if applicable)



Production release  
on Web



Social media and  
marketing

## Deliverables

1. App store releases
2. Web app
3. Social media performance analytics and promotional assets, animations, videos, etc



# Maintenance Stage



Stage 3

Support, monitoring, finetuning and follow up social media marketing campgains

## Activities

	Bug reports management and timely fixing		Update library version
	Follow up social media marketing and campaigns		Performance optimization
	24/7 Managed Cybersecurity Monitoring (NIST CSF 2.0 Compliance)		

## Deliverables

1. Bug reports and bug fixes
2. Performance test reports and optimizing updates
3. Social media performance analytics and promotional assets, animations, videos, etc





